

Deltek Costpoint® 7.1

Costpoint 7.1 to Costpoint 6.1 Menu Mapping

October 8, 2014

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This edition published October 2013.

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Accounting

General Ledger

Company Calendar

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Company Calendar	Client/Server	Web
Manage Fiscal Years	Accounting » General Ledger » Controls » Fiscal Years	Not in Costpoint Web
Manage Accounting Periods	Accounting » General Ledger » Controls » Accounting Periods	Not in Costpoint Web
Manage Subperiods	Accounting » General Ledger » Controls » Subperiods	Not in Costpoint Web
Manage Alternate Fiscal Year Mapping	Not in Costpoint Client/Server	Not in Costpoint Web
Close Periods	Accounting » General Ledger » Month-End Processing » Close Periods	Not in Costpoint Web

Organizations

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Organizations	Client/Server	Web
Manage Organization Structures	Accounting » General Ledger » Organizations » Define Org Structures	Accounting » Maintain » Organizations » Organization Structures

Manage Organization Elements	Accounting » General Ledger » Organizations » Maintain Org Elements	Accounting » Maintain » Organizations » Organization Elements
Manage Organization User-Defined Labels	Accounting » General Ledger » Controls » Organization User-Defined Labels	Not in Costpoint Web
Manage Organization User-Defined Information	Accounting » General Ledger » Organizations » Maintain Organization User-Defined Info	Accounting » Maintain » Organizations » Organization User-Defined Information
Print Organization List	Accounting » General Ledger » Organizations » Print Organizational Listing	Not in Costpoint Web

Accounts

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Accounts	Client/Server	Web
Configure Account Entry Groups	Accounting » General Ledger » Controls » Account Entry Groups	Not in Costpoint Web
Manage Accounts	Accounting » General Ledger » Accounts » Maintain Accounts	Accounting » Maintain » Accounts » Accounts
Link Accounts/Organizations	Accounting » General Ledger » Accounts » Maintain Account/Org Links	Accounting » Maintain » Organizations » Account/Organization Links
Mass Link Accounts/Organizations	Accounting » General Ledger » Accounts » Mass Link Account/Orgs	Accounting » Maintain » Organizations » Mass Link Accounts/Organizations
Manage Account User-Defined Labels	Accounting » General Ledger » Controls » Account User-Defined Labels	Not in Costpoint Web
Manage Account User-Defined Information	Accounting » General Ledger » Accounts » Maintain Account User-Defined Info	Accounting » Maintain » Accounts » Account User-Defined Information
Print Account List	Accounting » General Ledger » Accounts »	Not in Costpoint Web

	Print Account Listing	
Print Account/Organization List	Accounting » General Ledger » Accounts » Print Account/Org Listing	Not in Costpoint Web

Reorganizations

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Reorganizations	Client/Server	Web
Manage Reorganization Structures	Accounting » General Ledger » Reorganizations » Define Reorganization Structures	Not in Costpoint Web
Manage Reorganization Elements	Accounting » General Ledger » Reorganizations » Maintain Reorganization Elements	Not in Costpoint Web
Link Reorganizations/Organizations	Accounting » General Ledger » Reorganizations » Maintain Reorg/Org Links	Not in Costpoint Web
Mass Link Reorganizations/Organizations	Accounting » General Ledger » Reorganizations » Mass Link Reorg/Org	Not in Costpoint Web

Reference Numbers

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Reference Numbers	Client/Server	Web
Manage Reference Structures	Accounting » General Ledger » Reference Numbers (Ref) » Define Ref Structures	Not in Costpoint Web

Manage Reference Elements	Accounting » General Ledger » Reference Numbers (Ref) » Maintain Ref Elements	Not in Costpoint Web
Link References/Accounts/Organizations	Accounting » General Ledger » Reference Numbers (Ref) » Maintain Ref/Account/Org Links	Not in Costpoint Web
Mass Link References/Accounts/Organizations	Accounting » General Ledger » Reference Numbers (Ref) » Mass Link Ref/Account/Orgs	Not in Costpoint Web

Journal Entry Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Journal Entry Processing	Client/Server	Web
Manage System Assigned JE Number	Accounting » General Ledger » Controls » Set System Assigned JE Number	Not in Costpoint Web
Configure Journal Entry Cycles	Accounting » General Ledger » Controls » JE Cycles	Not in Costpoint Web
Manage Recurring Journal Entry Templates	Accounting » General Ledger » Journal Entries (JEs) » Maintain Recurring JE Templates	Not in Costpoint Web
Create Recurring Journal Entries	Accounting » General Ledger » Journal Entries (JEs) » Create Recurring JEs	Accounting » Process » General Ledger » Create Recurring Journal Entries
Manage Journal Entries	Accounting » General Ledger » Journal Entries (JEs) » Enter JEs	Accounting » Transactions » Journal Entries » Enter Journal Entries
Print Journal Entry Edit Report	Accounting » General Ledger » Journal Entries (JEs) » Print JE Edit Reports	Accounting » Review » General Ledger » Journal Entry Edit Report
Assign Journal Entry Approvers to Users	Accounting » General Ledger » Controls » JE Approver Settings	Administration » Configure » Accounting » JE Approver Settings

Print Pending Journal Entries Report	Accounting » General Ledger » JE Approvals & Posting » Print Pending JEs Report	Accounting » Review » General Ledger » Pending Journal Entries Report
Approve Journal Entries	Accounting » General Ledger » JE Approvals & Posting » Approve Journal Entries	Accounting » Transactions » Journal Entries » Approve Journal Entries
Print Approved Journal Entries Report	Accounting » General Ledger » JE Approvals & Posting » Print Approved JE Listing	Accounting » Review » General Ledger » Approved JE Listing
Post Journal Entries	Accounting » General Ledger » JE Approvals & Posting » Post JEs	Accounting » Process » Post » Post Journal Entries
Reverse Posted Journal Entry	Accounting » General Ledger » Journal Entries (JEs) » Reverse Posted JE	Accounting » Process » General Ledger » Reverse Posted Journal Entry
Print Journal Entry Posting Summary Report	Accounting » General Ledger » JE Approvals & Posting » Print JE Posting Summaries	Accounting » Review » General Ledger » Journal Entry Posting Summary Report
Configure Purchase Order Accruals	Accounting » General Ledger » Controls » Purchase Order Accrual Settings	Administration » Configure » Accounting » PO Accrual Settings
Configure Expense Commitment Accruals	Not in Costpoint Client/Server	Not in Costpoint Web
Create Purchase Order Accruals	Accounting » General Ledger » Journal Entries (JEs) » Create Purchase Order Accruals	Accounting » Process » General Ledger » Create Purchase Order Accruals
Create Subcontract Purchase Orders Retention Accruals	Accounting » General Ledger » Journal Entries (JEs) » Create Subcontract PO Retention Accruals	Accounting » Process » General Ledger » Create Subcontract PO Retention Accruals
Create Expense Commitment Accruals	Not in Costpoint Client/Server	Not in Costpoint Web
Create Revaluation Entry	Accounting » General Ledger » Journal Entries (JEs) » Create Revaluation Entry	Not in Costpoint Web

Multi-Company Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Multi-Company Processing	Client/Server	Web
Create/Delete Intercompany Receivables	Accounting » General Ledger » Multi-company » Create/Delete Intercompany Receivables	Accounting » Process » General Ledger » Create/Delete Intercompany Receivables
Print Intercompany Receivable Edit Report	Accounting » General Ledger » Multi-company » Print Intercompany Receivable Edit Report	Not in Costpoint Web
Post Intercompany Receivables	Accounting » General Ledger » Multi-company » Post Intercompany Receivables	Accounting » Process » Post » Post Intercompany Receivables

Sales and Value Added Tax Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Sales and Value Added Tax Processing	Client/Server	Web
Update Tax Report Tables	Accounting » General Ledger » Sales and Value Added Tax Reporting » Update Tax Report Tables	Not in Costpoint Web
Print Sales/Value Added Tax Report	Accounting » General Ledger » Sales and Value Added Tax Reporting » Sales/VAT Reporting	Accounting » Review » Sales and Value Added Tax » Value Added Tax Report
Print Intra European Community Trade Statistics Report	Accounting » General Ledger » Sales and Value Added Tax Reporting » Intra EC Trade Statistics Report	Not in Costpoint Web

View Tax Reporting Status by Tax Account	Accounting » General Ledger » Sales and Value Added Tax Reporting » Tax Reporting Status by Tax Account	Not in Costpoint Web
View Tax Reporting Status by Transaction	Accounting » General Ledger » Sales and Value Added Tax Reporting » Tax Reporting Status by Transaction	Accounting » Review » Sales and Value Added Tax » Tax Status by Transaction Report

General Ledger Beginning Balances

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » General Ledger Beginning Balances	Client/Server	Web
Update General Ledger Beginning Balances	Accounting » General Ledger » Month-End Processing » Update G/L Beginning Balances	Not in Costpoint Web
Manage Non-Project Beginning Balances	Accounting » General Ledger » Beginning Balances » Maintain Non-Project Beginning Balances	Accounting » Utilities » General Ledger Tools » Non-Project Beginning Balances
Manage PY Non-Project Comparative Balances	Accounting » General Ledger » Beginning Balances » Maintain Prior Year Non-Project Comparative Balances	Not in Costpoint Web
Manage Prior Year Project Comparative Balances	Accounting » General Ledger » Beginning Balances » Maintain Prior Year Project Comparative Balances	Not in Costpoint Web
Manage Project Beginning Balances	Accounting » General Ledger » Beginning Balances » Maintain Project Beginning Balances	Not in Costpoint Web
Manage Reference Beginning Balances	Accounting » General Ledger » Beginning Balances » Maintain Reference Beginning Balances	Not in Costpoint Web

General Ledger Budgets

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » General Ledger Budgets	Client/Server	Web
Manage Budget Revisions	Accounting » General Ledger » Budgets » Maintain Budget Revisions	Not in Costpoint Web
Manage Organization/Account Budgets	Accounting » General Ledger » Budgets » Maintain Org/Account Budgets	Not in Costpoint Web
Print General Ledger Budgets	Accounting » General Ledger » Budgets » Print G/L Budgets	Not in Costpoint Web

Financial Statement Configuration

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » Financial Statement Configuration	Client/Server	Web
Manage Equity Override Accounts	Accounting » General Ledger » Controls » Equity Accounts Override	Not in Costpoint Web
Manage Cash Flow Account Types	Accounting » General Ledger » Financial Statement Setup » Set Up Cash Flows Account Types	Accounting » Maintain » Financial Statements » Cash Flow Account Types
Manage Financial Statements	Accounting » General Ledger » Financial Statement Setup » Set Up Financial Statements	Accounting » Maintain » Financial Statements » Financial Statement Mappings

Print Financial Statement Setup	Accounting » General Ledger » Financial Statement Setup » Print Financial Statement Setup	Not in Costpoint Web
Print Unassigned/Duplicate Account Report	Accounting » General Ledger » Financial Statement Setup » Print Unassigned/Duplicate Accounts	Not in Costpoint Web

General Ledger Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » General Ledger Reports/Inquiries	Client/Server	Web
Create General Ledger Report Tables	Accounting » General Ledger » Reports » Create General Ledger Report Tables	Accounting » Process » General Ledger » Create General Ledger Report Tables
Create Preliminary Cash Flow Statements	Accounting » General Ledger » Reports » Create Preliminary Cash Flows Statement	Not in Costpoint Web
Manage Preliminary Cash Flow Statements	Accounting » General Ledger » Reports » Edit Preliminary Cash Flows Statement	Accounting » Transactions » Cash Flow » Edit Preliminary Cash Flows Statement
Print Financial Statements	Accounting » General Ledger » Reports » Print Financial Statements	Accounting » Review » General Ledger » Financial Statements Report
Print Financial Statement Detail Report	Accounting » General Ledger » Reports » Print Financial Statement Detail	Accounting » Review » General Ledger » Financial Statement Detail Report
Print YTD Comparative Financial Statements	Not in Costpoint Client/Server	Not in Costpoint Web
Print General Ledger Detail Report	Accounting » General Ledger » Reports » Print General Ledger Detail	Accounting » Review » General Ledger » General Ledger Detail Report
Print General Ledger Posting Summary Report	Accounting » General Ledger » Reports » Print General Ledger Posting Summary	Accounting » Review » General Ledger » General Ledger Posting Summary Report

Print Project Ledger Detail Report	Accounting » General Ledger » Reports » Print Project Ledger Detail	Accounting » Review » General Ledger » Project Ledger Detail Report
Print Project Trial Balance Report	Accounting » General Ledger » Reports » Print Project Trial Balance	Accounting » Review » General Ledger » Project Trial Balance Report
Print Trial Balance Report	Accounting » General Ledger » Reports » Print Trial Balance	Accounting » Review » General Ledger » Trial Balance Report
Compare General Ledger Actual to Budget Activity	Accounting » General Ledger » Inquiry » G/L Inquiry-Budget and Prior Year Comparison	Accounting » Review » General Ledger » G/L Budget and Prior Year Comparison Inquiry
View Account Activity	Accounting » General Ledger » Inquiry » Account Activity Inquiry	Accounting » Review » General Ledger » Account Activity Inquiry
View General Ledger Activity	Accounting » General Ledger » Inquiry » G/L Inquiry	Accounting » Review » General Ledger » General Ledger Inquiry

General Ledger Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » General Ledger Utilities	Client/Server	Web
Defer Unposted Transactions	Accounting » General Ledger » Utilities » Defer Unposted Transactions	Not in Costpoint Web
Print Labor History to General Ledger Comparison Report	Accounting » General Ledger » Utilities » Labor History to General Ledger Comparison	Accounting » Utilities » General Ledger Tools » Labor History to General Ledger Comparison
Purge Intercompany Receivables	Accounting » General Ledger » Utilities » Purge Intercompany Receivables	Not in Costpoint Web
Purge Journal Entry History	Accounting » General Ledger » Utilities » Purge	Not in Costpoint Web

	JE History	
Update Financial Statement Summary Balances	Accounting » General Ledger » Utilities » Update Financial Statement Summary Balances	Accounting » Utilities » General Ledger Tools » Update Financial Statement Summary Balances
Update Reference Summary Balances	Accounting » General Ledger » Utilities » Update Reference Summary Balances	Not in Costpoint Web

General Ledger Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » General Ledger Interfaces	Client/Server	Web
Manage Journal Entry Preprocessor Settings	Others » Product Interfaces » Preprocessors » Journal Entry Suspense Setup	Not in Costpoint Web
Import Journal Entries	Others » Product Interfaces » Preprocessors » Journal Entry Preprocessor	Accounting » Utilities » Import » Import Journal Entries
Corporate Planner	Others » Product Interfaces » Corporate Planner Interface	Not in Costpoint Web

General Ledger Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » General Ledger » General Ledger Controls	Client/Server	Web
Configure General Ledger Settings	Accounting » General Ledger » Controls » G/L Settings	Not in Costpoint Web
Configure Company Information	Accounting » General Ledger » Organizations »	Accounting » Configure » General Ledger »

	Set Up Company Info	Company Taxable Entity Information
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Multicurrency

Exchange Rates

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Multicurrency » Exchange Rates	Client/Server	Web
Manage Exchange Rate Sources	Accounting » Multicurrency » Exchange Rates » Maintain Exchange Rate Sources	Administration » Maintain » Multicurrency » Exchange Rate Sources
Manage Exchange Rate Groups	Accounting » Multicurrency » Exchange Rates » Maintain Exchange Rate Groups	Not in Costpoint Web
Manage Exchange Rates by Date	Accounting » Multicurrency » Exchange Rates » Maintain Exchange Rates by Date	Administration » Maintain » Multicurrency » Exchange Rates by Date
Manage Daily Exchange Rates	Accounting » Multicurrency » Exchange Rates » Enter Daily Rates	Administration » Maintain » Multicurrency » Daily Exchange Rates
Import Daily Exchange Rates	Accounting » Multicurrency » Exchange Rates » Upload Daily Exchange Rates	Not in Costpoint Web
Manage Exchange Rates by Period	Accounting » Multicurrency » Exchange Rates » Maintain Exchange Rates by Period	Administration » Maintain » Multicurrency » Exchange Rates by Period
Manage Period Exchange Rates	Accounting » Multicurrency » Exchange Rates » Enter Period Rates	Administration » Maintain » Multicurrency » Period Exchange Rates
Print Exchange Rates Report	Accounting » Multicurrency » Exchange Rates » Print Exchange Rates Report	Not in Costpoint Web

Gains/Losses Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Multicurrency » Gains/Losses Processing	Client/Server	Web
Update Open Accounts Payable Exchange Rates	Accounting » Multicurrency » Gains/Losses » Update Open A/P Exchange Rates	Not in Costpoint Web
Update Open Accounts Receivable Exchange Rates	Accounting » Multicurrency » Gains/Losses » Update Open A/R Exchange Rates	Administration » Process » Multicurrency » Update Open A/R Exchange Rates
Compute/Post Unrealized Gains/Losses	Accounting » Multicurrency » Gains/Losses Processing » Compute/Post Unrealized Gains/Losses	Accounting » Process » Post » Compute/Post Unrealized Gains/Losses

Multicurrency Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Multicurrency » Multicurrency Utilities	Client/Server	Web
Compute Future Value of Money	Accounting » Multicurrency » Utilities » Currency/Units Converter	Not in Costpoint Web
Update Currency Codes for Current Version	Accounting » Multicurrency » Utilities » Miscellaneous Toolkits » Initialize Currency Codes for Version 6.1*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Multicurrency Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Multicurrency » Multicurrency Controls	Client/Server	Web
Configure Multicurrency Settings	Accounting » Multicurrency » Controls » Multicurrency Settings	Not in Costpoint Web
Manage Multicurrency Accounts	Accounting » Multicurrency » Controls » Multicurrency Accounts	Administration » Maintain » Multicurrency » Multicurrency Accounts

Currency Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Multicurrency » Currency Controls	Client/Server	Web
Manage Currencies	Accounting » Multicurrency » Currencies » Maintain Currencies	Administration » Maintain » Multicurrency » Currencies
Manage Currency Status	Accounting » Multicurrency » Currencies » Currency Status	Administration » Maintain » Multicurrency » Currency Status

Accounts Payable

Vendors

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Vendors	Client/Server	Web
Manage Vendors	Accounting » Accounts Payable » Vendor Info	Accounting » Maintain Vendors » Vendor

	» Maintain Vendors	User Flow
Approve Vendors	Accounting » Accounts Payable » Vendor Info » Approve Vendors	Accounting » Maintain » Vendors » Approve Vendors
Print Vendor List	Accounting » Accounts Payable » Vendor Reports » Print Vendor Listing	Not in Costpoint Web
Print Vendor Information Report	Accounting » Accounts Payable » Vendor Reports » Print Vendor Information Reports	Not in Costpoint Web

Voucher Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Voucher Processing	Client/Server	Web
Manage Accounts Payable Vouchers	Accounting » Accounts Payable » Vouchers » Enter A/P Vouchers	Accounting » Transactions » Vouchers » Enter A/P Vouchers
Create Recurring Accounts Payable Vouchers	Accounting » Accounts Payable » Vouchers » Create Recurring A/P Vouchers	Not in Costpoint Web
Manage Purchase Order Vouchers	Accounting » Accounts Payable » Vouchers » Enter PO Vouchers	Accounting » Transactions » Vouchers » Enter PO Vouchers
Create PO Vouchers from POs/Receipts	Accounting » Accounts Payable » Vouchers » Create PO Vouchers from POs/Receipts	Not in Costpoint Web
Create Subcontract Purchase Order Vouchers	Accounting » Accounts Payable » Vouchers » Create Subcontract PO Vouchers	Not in Costpoint Web
Create Debit Memos	Accounting » Accounts Payable » Vouchers » Create Debit Memos	Accounting » Transactions » Vouchers » Create Debit Memos
Print Debit Memos	Accounting » Accounts Payable » Vouchers »	Accounting » Transactions » Vouchers »

Accounting

	Print Debit Memos	Print Debit Memos
Print Voucher Edit Report	Accounting » Accounts Payable » Vouchers » Print Voucher Edit	Accounting » Review » Vouchers » Voucher Edit Report
Print Duplicate Invoices	Accounting » Accounts Payable » Vouchers » Print Duplicate Invoices	Not in Costpoint Web
Recompute and Print Discrepancies	Accounting » Accounts Payable » Vouchers » Recompute and Print Discrepancies	Accounting » Process » Vouchers » Recompute PO Voucher Discrepancies
Print Pending Vouchers Report	Accounting » Accounts Payable » Voucher Approvals & Posting » Print Pending Vouchers Report	Accounting » Review » Vouchers » Pending Vouchers Report
Approve Vouchers	Accounting » Accounts Payable » Voucher Approvals & Posting » Approve Vouchers	Accounting » Transactions » Vouchers » Approve Vouchers
Print Approved Voucher List	Accounting » Accounts Payable » Voucher Approvals & Posting » Print Approved Voucher Listing	Accounting » Review » Vouchers » Approved Voucher List
Post Vouchers	Accounting » Accounts Payable » Voucher Approvals & Posting » Post Vouchers	Accounting » Process » Post » Post Vouchers
Reverse Posted Vouchers	Accounting » Accounts Payable » Vouchers » Reverse Posted Vouchers	Accounting » Transactions » Vouchers » Reverse Posted Vouchers

Payment Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Payment Processing	Client/Server	Web
Update Pay When Paid Voucher History	Accounting » Accounts Payable » Prepare/Approve Checks » Update Pay When	Not in Costpoint Web

	Paid Voucher History	
Select Vouchers For Payment	Accounting » Accounts Payable » Prepare/Approve Checks » Select Vouchers	Accounting » Process » Pay » Select Vouchers
Edit Voucher Payment Status	Accounting » Accounts Payable » Prepare/Approve Checks » Edit Payment Status by AP Account	Accounting » Process » Pay » Edit Voucher Payment Status
Approve Checks	Accounting » Accounts Payable » Prepare/Approve Checks » Approve Checks	Accounting » Transactions » Checks » Approve Checks
Print Prepayment Edit Report	Accounting » Accounts Payable » Prepare/Approve Checks » Print Prepayment Edit	Accounting » Process » Pay » Prepayment Edit Report
Print/Void Checks	Accounting » Accounts Payable » Print Checks » Print/Void Checks	Accounting » Process » Pay » Print/Void A/P Checks
Manage Manual Checks	Accounting » Accounts Payable » Print Checks » Record Manual Checks	Accounting » Transactions » Checks » Record Manual Checks
Manage Unusable Checks	Accounting » Accounts Payable » Print Checks » Record Unusable Checks	Not in Costpoint Web
Post Cash Disbursements	Accounting » Accounts Payable » Print Checks » Post Cash Disbursements	Accounting » Process » Post » Post Cash Disbursements
Print EFT Pre-Transfer Edit Report	Accounting » Accounts Payable » EFT » Print EFT Pre-Transfer Edit Report	Accounting » Process » Pay » EFT Pre-Transfer Edit Report
Create EFT File	Accounting » Accounts Payable » EFT » Create EFT File	Not in Costpoint Web
Print EFT Edit Report	Accounting » Accounts Payable » EFT » Print EFT Edit Report	Accounting » Process » Pay » EFT Edit Report
Manage CIS Voucher History	Accounting » Accounts Payable » CIS	Not in Costpoint Web

	Vouchers » Maintain CIS Voucher History	
Manage Spoilt CIS Vouchers	Accounting » Accounts Payable » CIS Vouchers » Record Spoilt CIS Vouchers	Not in Costpoint Web

Year-End Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Year-End Processing	Client/Server	Web
Create 1099 Information	Accounting » Accounts Payable Year-End Processing » Create 1099 Information	Not in Costpoint Web
Print 1099 Edit Report	Accounting » Accounts Payable Year-End Processing » Print 1099 Edit Report	Not in Costpoint Web
Edit 1099 Information	Accounting » Accounts Payable Year-End Processing » Edit 1099 Information	Not in Costpoint Web
Print/Create 1099s and Magnetic Media	Accounting » Accounts Payable Year-End Processing » Print 1099s/Create Magnetic Media	Not in Costpoint Web

Accounts Payable Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Accounts Payable Reports/Inquiries	Client/Server	Web
Print Accounts Payable History Report	Accounting » Accounts Payable » Reports » Print AP History Report	Accounting » Review » Accounts Payable » A/P History Report

Print Cash Requirements Report	Accounting » Accounts Payable » Reports » Cash Requirements Report	Accounting » Review » Accounts Payable » Cash Requirements Report
Print Check Register Report	Accounting » Accounts Payable » Reports » Check Register	Accounting » Review » Accounts Payable » Check Register
Print Open Accounts Payable Report	Accounting » Accounts Payable » Reports » Open A/P Report	Accounting » Review » Accounts Payable » Open A/P Report
Print Subcontractor Information Report	Accounting » Accounts Payable » Vendor Reports » Print Subcontractor Information Report	Not in Costpoint Web
Print Vendor Bank Information Report	Accounting » Accounts Payable » Vendor Reports » Print Vendor Bank Info Report	Not in Costpoint Web
Print Voucher Register Report	Accounting » Accounts Payable » Reports » Voucher Register	Accounting » Review » Vouchers » Voucher Register
View Check History Inquiry	Accounting » Accounts Payable » Inquiry » Check History Inquiry	Accounting » Review » Accounts Payable » A/P Check History Inquiry
View Vendor History Inquiry	Accounting » Accounts Payable » Inquiry » Vendor History Inquiry	Accounting » Review » Vendors » Vendor History Inquiry
View Voucher History Inquiry	Accounting » Accounts Payable » Inquiry » Voucher History Inquiry	Accounting » Review » Vouchers » Voucher History Inquiry

Accounts Payable Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Accounts Payable Utilities	Client/Server	Web
Manage Vendor History	Accounting » Accounts Payable » Utilities » Maintain Vendor History	Not in Costpoint Web

Manage Check History	Accounting » Accounts Payable » Utilities » Maintain Check History	Accounting » Utilities » Transaction History » Initialize Check History
Convert EFT File to Non-US Format	Accounting » Accounts Payable » Utilities » Miscellaneous Toolkits » Electronic Funds Transfer (EFT) File Conversion*	Not in Costpoint Web
Purge Vouchers	Accounting » Accounts Payable » Utilities » Purge Vouchers	Not in Costpoint Web
Update Discount Method for Posted Vouchers	Accounting » Accounts Payable » Utilities » Miscellaneous Toolkits » Update Discount Method for Posted Vouchers*	Not in Costpoint Web
Update Vendor Address Line Information	Accounting » Accounts Payable » Utilities » Miscellaneous Toolkits » Reorder Vendor Address Line Information*	Not in Costpoint Web
Update Vendor Default Account Descriptions	Accounting » Accounts Payable » Utilities » Miscellaneous Toolkits » Update Vendor Default Account Descriptions*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Accounts Payable Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Accounts Payable Interfaces	Client/Server	Web
Import Vendors	Others » Product Interfaces » Preprocessors » Vendor Master Preprocessor	Not in Costpoint Web
Manage Accounts Payable Voucher Suspense	Others » Product Interfaces » Preprocessors » A/P Voucher Suspense Setup	Not in Costpoint Web

Import Accounts Payable Vouchers	Others » Product Interfaces » Preprocessors » A/P Voucher Preprocessor	Not in Costpoint Web
Import Accounts Payable Multicurrency Vouchers	Others » Product Interfaces » Preprocessors » Multicurrency A/P Voucher Preprocessor	Not in Costpoint Web
Import Purchase Order Vouchers	Others » Product Interfaces » Preprocessors » PO Vouchers Preprocessor	Not in Costpoint Web
Import Company Credit Card Transactions	Accounting » Accounts Payable » Utilities » Company Credit Card Transaction Upload	Not in Costpoint Web
Configure TE Suspense Settings	Others » Product Interfaces » Preprocessors » TE Suspense Setup	Not in Costpoint Web
Import TE Expenses/Advances	Others » Product Interfaces » Preprocessors » TE Expense Report Preprocessor	Not in Costpoint Web
Configure TE Commitments Suspense Settings	Not in Costpoint Client/Server	Not in Costpoint Web
Import TE Expense Commitments	Not in Costpoint Client/Server	Not in Costpoint Web

Accounts Payable Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Accounts Payable Controls	Client/Server	Web
Configure Accounts Payable Settings	Accounting » Accounts Payable » Controls » A/P Settings	Administration » Configure » Accounting » A/P Settings
Configure Check Settings	Accounting » Accounts Payable » Controls » Check Settings	Not in Costpoint Web
Manage Accounts Payable Accounts	Accounting » Accounts Payable » Controls » A/P Accounts	Not in Costpoint Web

Manage Cash Accounts	Accounting » Accounts Payable » Controls » Cash Accounts	Accounting » Maintain » Accounts » Cash Accounts Accounting » Maintain » Accounts » Cash Accounts
Manage Cash Requirements Rpt Supplemental Amounts	Accounting » Accounts Payable » Reports » Cash Requirements Report Supplemental Amounts	Not in Costpoint Web
Configure Accounts Payable Voucher Settings	Accounting » Accounts Payable » Controls » A/P Voucher Settings	Administration » Configure » Accounting » A/P Voucher Settings
Configure Purchase Order Voucher Settings	Accounting » Accounts Payable » Controls » PO Voucher Settings	Not in Costpoint Web
Configure Approver Settings	Accounting » Accounts Payable » Controls » Approver Settings	Administration » Configure » Accounting » A/P Approver Settings
Manage Recurring A/P Voucher Codes	Accounting » Accounts Payable » Controls » Recurring AP Voucher Codes	Not in Costpoint Web
Manage Credit Card Import Information	Accounting » Accounts Payable » Controls » Maintain Credit Card Upload Info	Not in Costpoint Web
Manage Insurance Carrier Information	Accounting » Accounts Payable » Controls » Maintain Insurance Carrier Information	Accounting » Configure » Vendors » Insurance Carrier Information
Manage Construction Industry Scheme Codes	Others » System Administration » System Codes » Maintain CIS Codes	Not in Costpoint Web

Lien Waiver Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Lien Waiver Controls	Client/Server	Web
Manage Lien Waiver Document Names	Accounting » Accounts Payable » Lien Waiver Processing and Information » Maintain Lien Waiver Document Names	Not in Costpoint Web
Manage Project Waiver Information	Accounting » Accounts Payable » Lien Waiver Processing and Information » Maintain Project Waiver Information	Not in Costpoint Web
Print Lien Waivers	Accounting » Accounts Payable » Lien Waiver Processing and Information » Print Lien Waivers	Not in Costpoint Web
Manage Lien Waiver Information	Accounting » Accounts Payable » Lien Waiver Processing and Information » Maintain Lien Waiver Information	Not in Costpoint Web

Vendor and Subcontractor Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Payable » Vendor and Subcontractor Controls	Client/Server	Web
Configure Vendor Settings	Accounting » Accounts Payable » Controls » Vendor Settings	Not in Costpoint Web
Manage Vendor Terms	Accounting » Accounts Payable » Controls » Vendor Terms	Not in Costpoint Web

Configure Vendor Approver Settings	Accounting » Accounts Payable » Controls » Vendor Approver Settings	Administration » Configure » Accounting » Vendor Approver Settings
Manage Vendor User-Defined Labels	Accounting » Accounts Payable » Controls » Vendor User-Defined Labels	Not in Costpoint Web
Manage Subcontractor Insurance Types	Accounting » Accounts Payable » Controls » Maintain Subcontractor Insurance Types	Accounting » Configure » Vendors » Subcontractor Insurance Types
Manage Subcontractor Bond Types	Accounting » Accounts Payable » Controls » Maintain Subcontractor Bond Types	Accounting » Configure » Vendors » Subcontractor Bond Types

Accounts Receivable

Customers

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Customers	Client/Server	Web
Manage Customers	Accounting » Accounts Receivable » Customer Info » Maintain Customer	Accounting » Maintain » Customers » Customers
Manage Customer User-Defined Information	Accounting » Accounts Receivable » Customer Info » Customer User-Defined Info	Accounting » Maintain » Customers » Customer User-Defined Information
Print Customer List	Accounting » Accounts Receivable » Customer Info » Print Customer Listing	Not in Costpoint Web

Cash Receipts Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Cash Receipts Processing	Client/Server	Web
Manage Cash Receipts	Accounting » Accounts Receivable » Cash Receipts » Enter Cash Receipts	Accounting » Transaction » Cash Receipts » Enter Cash Receipts
Copy/Reverse Cash Receipts	Accounting » Accounts Receivable » Cash Receipts » Restore Cash Receipts	Not in Costpoint Web
Print Cash Receipts Edit Report	Accounting » Accounts Receivable » Cash Receipts » Print Cash Receipts Edit Report	Accounting » Review » Cash Receipts » Cash Receipts Edit Report
Post Cash Receipts	Accounting » Accounts Receivable » Cash Receipts » Post Cash Receipts	Accounting » Process » Post » Post Cash Receipts
Print Cash Receipts Register Report	Accounting » Accounts Receivable » Cash Receipts » Print Cash Receipts Register	Accounting » Review » Cash Receipts » Cash Receipts Register
Edit/Manage A/R Underpayment Amounts	Accounting » Accounts Receivable » Cash Receipts » Adjust A/R Underpayment Amounts	Accounting » Transactions » Cash Receipts » Adjust A/R Underpayment Amounts

Lien Waiver Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Lien Waiver Controls	Client/Server	Web
Manage Lien Waiver Document Names	Accounting » Accounts Receivable » Lien Waiver Processing and Information » Maintain Lien Waiver Document Names	Not in Costpoint Web

Manage A/R Project Waiver Information	Accounting » Accounts Receivable » Lien Waiver Processing and Information » Maintain Project Waiver Information	Not in Costpoint Web
Print A/R Lien Waiver Forms	Accounting » Accounts Receivable » Lien Waiver Processing and Information » Print Lien Waivers	Not in Costpoint Web
Manage A/R Lien Waiver Information	Accounting » Accounts Receivable » Lien Waiver Processing and Information » Maintain Lien Waiver Information	Not in Costpoint Web

Finance Charges

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Finance Charges	Client/Server	Web
Compute Customer Finance Charges	Accounting » Accounts Receivable » Finance Charges » Compute Finance Charges	Not in Costpoint Web

Accounts Receivable Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Accounts Receivable Reports/Inquiries	Client/Server	Web
Print Accounts Receivable Aging Report	Accounting » Accounts Receivable » Reports » Print Accounts Receivable Aging Report	Accounting » Review » Accounts Receivable » A/R Aging Report
Print Accounts Receivable History Report	Accounting » Accounts Receivable » Reports » Print Accounts Receivable History Report	Accounting » Review » Accounts Receivable » A/R History Report

Print Customer Statements	Accounting » Accounts Receivable » Reports » Print Customer Statement	Accounting » Review » Cash Receipts » Customer Statement
View Receivables and Collections	Accounting » Accounts Receivable » Inquiry » Analyze Receivables and Collections	Accounting » Review » Accounts Receivable » Receivables and Collections Inquiry

Accounts Receivable Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Accounts Receivable Utilities	Client/Server	Web
Manage Accounts Receivable History	Accounting » Accounts Receivable » Beginning Balances » Maintain A/R History	Accounting » Utilities » Transaction History » Initialize A/R History

Accounts Receivable Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Accounts Receivable Interfaces	Client/Server	Web
Manage Cash Receipts Preprocessor Settings	Others » Product Interfaces » Preprocessors » Cash Receipt Preprocessor Settings	Not in Costpoint Web
Import Cash Receipts	Others » Product Interfaces » Preprocessors » Cash Receipt Preprocessor	Not in Costpoint Web

Accounts Receivable Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Accounts Receivable Controls	Client/Server	Web
Configure Accounts Receivable Settings	Accounting » Accounts Receivable » Controls » A/R Settings	Administration » Configure » Accounting » A/R Settings
Configure System Assigned Cash Receipt Number	Accounting » Accounts Receivable » Controls » Set System Assigned Cash Receipt Number	Not in Costpoint Web
Manage Transfer Accounts	Accounting » Accounts Receivable » Controls » Maintain Transfer Accounts	Accounting » Maintain » Accounts » Transfer Accounts
Manage Customer Terms	Accounting » Accounts Receivable » Customer Controls » Customer Terms	Not in Costpoint Web
Manage Customer User-Defined Labels	Accounting » Accounts Receivable » Customer Controls » Customer User-Defined Labels	Not in Costpoint Web
Manage Customer Types	Accounting » Accounts Receivable » Customer Controls » Customer Types	Accounting » Configure » Customers » Customer Types Materials » Configure » Customers » Customer Types
Manage Customer Credit Limits	Accounting » Accounts Receivable » Customer Controls » Credit Limits	Accounting » Configure » Customers » Customer Credit Limits Materials » Configure » Customers » Customer Credit Limits
Manage Customer Credit Ratings	Accounting » Accounts Receivable » Customer Controls » Credit Ratings	Accounting » Configure » Customers » Customer Credit Ratings Materials » Configure » Customers » Customer Credit Ratings

Accounting

Manage Sales Territories	Accounting » Accounts Receivable » Customer Controls » Sales Territories	Accounting » Configure » Customers » Sales Territories Materials » Configure » Customers » Sales Territories
Manage Shipping Methods	Accounting » Accounts Receivable » Customer Controls » Shipping Methods	Accounting » Configure » Customers » Shipping Methods

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Accounts Receivable » Administrative Utilities	Client/Server	Web
Purge Cash Receipts History	Accounting » Accounts Receivable » Utilities » Purge Cash Receipts History	Not in Costpoint Web
Purge Customers	Accounting » Accounts Receivable » Utilities » Purge Customers	Not in Costpoint Web

Cash Management

Bank Account Management

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Cash Management » Bank Account Management	Client/Server	Web
Manage Company Bank Accounts (US Banks)	Accounting » Cash Management » Bank Account Management » Maintain Company Bank Accounts	Not in Costpoint Web

Manage Company Bank Accounts (Non-US Banks)	Accounting » Cash Management » Bank Account Management » Maintain Company Bank Accounts	Not in Costpoint Web
Adjust Currency Balances	Accounting » Cash Management » Bank Account Management » Currency Balance and Adjustments	Not in Costpoint Web
Update Cash Accounts	Accounting » Cash Management » Bank Account Management » Update Cash Accounts	Not in Costpoint Web
Manage Bank Statement Information	Accounting » Cash Management » Bank Account Management » Maintain Bank Statement Info	Not in Costpoint Web
Print Bank Statement Report	Accounting » Cash Management » Bank Account Management » Print Bank Statement Report	Not in Costpoint Web
Create Bank Transactions History	Accounting » Cash Management » Bank Account Management » Create Bank Transactions History	Not in Costpoint Web
Accept Bank Transactions	Accounting » Cash Management » Bank Account Management » Accept Bank Transactions	Not in Costpoint Web
Process Bank Transactions Acceptances	Accounting » Cash Management » Bank Account Management » Process Batch Bank Transactions	Not in Costpoint Web

Cash Forecasting

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Cash Management » Cash Forecasting	Client/Server	Web
Create Preliminary Cash Forecasts	Accounting » Cash Management » Cash Forecasting » Create Preliminary Cash Forecasts	Not in Costpoint Web
Manage Preliminary Cash Forecasts	Accounting » Cash Management » Cash Forecasting » Edit Preliminary Cash Forecasts	Not in Costpoint Web
Print Cash Forecasts Report	Accounting » Cash Management » Cash Forecasting » Print Cash Forecasts	Not in Costpoint Web

Cash Management Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Cash Management » Cash Management Reports/Utilities	Client/Server	Web
Print Bank Reconciliation Detail Reports	Accounting » Cash Management » Bank Account Management » Bank Reconciliation Detail Reports	Not in Costpoint Web
Print Bank Reconciliation Summary Report	Accounting » Cash Management » Bank Account Management » Bank Reconciliation Summary Report	Not in Costpoint Web
View Bank Reconciliation Summary	Accounting » Cash Management » Bank Account Management » Bank Reconciliation Inquiry	Not in Costpoint Web

Cash Management Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Cash Management » Cash Management Utilities	Client/Server	Web
Purge Bank Transaction History	Accounting » Cash Management » Bank Account Management » Purge Bank Transactions History	Not in Costpoint Web
Update Beginning Bank Statement Balances	Accounting » General Ledger » Utilities » Miscellaneous Toolkits » Update Beginning Bank Statement Balances *	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Cash Management Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Cash Management » Cash Management Controls	Client/Server	Web
Manage Banks (US)	Accounting » Cash Management » Bank Account Management » Maintain Banks	Not in Costpoint Web
Manage Banks (Non-US)	Accounting » Cash Management » Bank Account Management » Maintain Banks	Not in Costpoint Web
Manage Intermediary Banks	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Cash Forecast Templates	Accounting » Cash Management » Cash Forecasting » Maintain Cash Forecast Templates	Not in Costpoint Web

Manage Cash Forecast Accounts	Accounting » Cash Management » Cash Forecasting » Cash Forecast Accounts	Not in Costpoint Web
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Fixed Assets

Fixed Assets Calendar

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Fixed Assets Calendar	Client/Server	Web
Manage Fixed Assets Fiscal Years	Accounting » Fixed Assets » FA FY/PD Settings » Maintain FA Fiscal Years	Not in Costpoint Web
Manage Fixed Assets Accounting Periods	Accounting » Fixed Assets » FA FY/PD Settings » Maintain FA Accounting Periods	Not in Costpoint Web
Update FA FY/Pd Information from GL FY/Pd Information	Accounting » Fixed Assets » FA FY/PD Settings » Update FA FY/PD Info from GL FY/PD Info	Not in Costpoint Web

Asset Master Records

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Asset Master Records	Client/Server	Web
Manage Asset Template Information	Accounting » Fixed Assets » Asset Template » Maintain Asset Template Info	Not in Costpoint Web
Manage Asset Template User-Defined Information	Accounting » Fixed Assets » Asset Template » Maintain Template User-Defined Info	Not in Costpoint Web

Print Asset Template List	Accounting » Fixed Assets » Asset Template » Print Asset Template List	Not in Costpoint Web
Print Asset Template Detail Report	Accounting » Fixed Assets » Asset Template » Print Asset Template Detail Report	Not in Costpoint Web
Manage Asset Master Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Master Info	Not in Costpoint Web
Manage Asset Description Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Desc Info	Not in Costpoint Web
Manage Asset Purchase Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Purchase Info	Not in Costpoint Web
Manage Asset Cost Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Cost Info	Not in Costpoint Web
Manage Asset Location Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Location Info	Not in Costpoint Web
Manage Asset Account Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Account Info	Not in Costpoint Web
Manage Asset General Ledger Book Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset G/L Book Info	Not in Costpoint Web
Manage Asset Other Books Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Other Books Info	Not in Costpoint Web
Manage Asset Disposal Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Disposal Info	Not in Costpoint Web
Manage Asset Government Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset Government Info	Not in Costpoint Web

Manage Asset User-Defined Information	Accounting » Fixed Assets » Asset Master Recorder » Maintain Asset User-Defined Info	Not in Costpoint Web
Print Asset Master List	Accounting » Fixed Assets » Asset Master Recorder » Print Asset Master List	Not in Costpoint Web
Print Asset Master Detail Report	Accounting » Fixed Assets » Asset Master Recorder » Print Asset Master Detail	Not in Costpoint Web
Create Autocreation Transactions	Accounting » Fixed Assets » Autocreation of Asset Records » Create Autocreation Transactions	Not in Costpoint Web
Manage Autocreation Transactions	Accounting » Fixed Assets » Autocreation of Asset Records » Edit Autocreation Transactions	Not in Costpoint Web
Print Autocreation Transactions Edit Report	Accounting » Fixed Assets » Autocreation of Asset Records » Print Autocreation Transactions Edit Report	Not in Costpoint Web
Create Asset Master Records	Accounting » Fixed Assets » Autocreation of Asset Records » Process Autocreation Transactions	Not in Costpoint Web

Inventory Records

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Inventory Records	Client/Server	Web
Manage Asset Inventory Transactions	Accounting » Fixed Assets » Inventory Records » Maintain Inventory Info	Not in Costpoint Web
Create Asset Inventory Transactions	Accounting » Fixed Assets » Inventory Records » Create Inventory Transactions	Not in Costpoint Web

Edit Asset Inventory Transactions	Accounting » Fixed Assets » Inventory Records » Edit Inventory Transactions	Not in Costpoint Web
Create Asset Inventory Information	Accounting » Fixed Assets » Inventory Records » Process Inventory Transactions	Not in Costpoint Web
Print Asset Inventory Information Report	Accounting » Fixed Assets » Inventory Records » Print Inventory Info	Not in Costpoint Web

Maintenance Records

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Maintenance Records	Client/Server	Web
Manage Asset Maintenance Information	Accounting » Fixed Assets » Maintenance Records » Maintain Maintenance Info	Not in Costpoint Web
Create Asset Maintenance Transactions	Accounting » Fixed Assets » Maintenance Records » Create Maintenance Transactions	Not in Costpoint Web
Manage Asset Maintenance Transactions	Accounting » Fixed Assets » Maintenance Records » Edit Maintenance Transactions	Not in Costpoint Web
Create Asset Maintenance Information	Accounting » Fixed Assets » Maintenance Records » Process Maintenance Transactions	Not in Costpoint Web
Print Asset Maintenance Information Report	Accounting » Fixed Assets » Maintenance Records » Print Maintenance Info	Not in Costpoint Web

Transfer Records

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Transfer Records	Client/Server	Web
Manage Asset Transfer Information	Accounting » Fixed Assets » Transfer Records » Maintain Transfer Info	Not in Costpoint Web
Create Asset Transfer Transactions	Accounting » Fixed Assets » Transfer Records » Create Transfer Transactions	Not in Costpoint Web
Manage Asset Transfer Transactions	Accounting » Fixed Assets » Transfer Records » Edit Transfer Transactions	Not in Costpoint Web
Create Asset Transfer Information	Accounting » Fixed Assets » Transfer Records » Process Transfer Transactions	Not in Costpoint Web
Print Asset Transfer Information Report	Accounting » Fixed Assets » Transfer Records » Print Transfer Info	Not in Costpoint Web

Fixed Assets Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Fixed Assets Processing	Client/Server	Web
Compute Depreciation	Accounting » Fixed Assets » Depreciation » Compute Depreciation	Not in Costpoint Web
View Other Books Depreciation History	Accounting » Fixed Assets » Depreciation » Others Books Depr History Inquiry	Not in Costpoint Web
Print Current Period Depreciation Report	Accounting » Fixed Assets » Depreciation » Print Current Period Depreciation Rpt	Not in Costpoint Web

Print Sequential Other Books Depreciation History Rpt	Accounting » Fixed Assets » Depreciation » Print Sequential Other Bks Depr History	Not in Costpoint Web
Manage Disposal Transactions	Accounting » Fixed Assets » Disposals » Maintain Single Disposal Transactions	Not in Costpoint Web
Create Multiple Disposal Transactions	Accounting » Fixed Assets » Disposals » Create Multiple Disposal Transactions	Not in Costpoint Web
Print Disposal Transactions Edit Report	Accounting » Fixed Assets » Disposals » Print Disposal Transactions Edit Report	Not in Costpoint Web
Post Fixed Assets Journal	Accounting » Fixed Assets » Post Depreciation and Disposals » Post Fixed Assets Journal	Not in Costpoint Web
Reverse Posted Fixed Assets Entry	Accounting » Fixed Assets » Post Depreciation and Disposals » Reverse Posted Fixed Assets Entry	Not in Costpoint Web
Print Posted Transactions Detail Report	Accounting » Fixed Assets » Post Depreciation and Disposals » Print Posted Transactions Detail	Not in Costpoint Web
Print Sequential Posted Depreciation History Report	Accounting » Fixed Assets » Post Depreciation and Disposals » Print Sequential Posted Depr History	Not in Costpoint Web
Close Fixed Assets Accounting Period	Accounting » Fixed Assets » Close Fixed Assets Acctng PD » Close Fixed Assets Acctng PD	Not in Costpoint Web

Projections

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Projections	Client/Server	Web
Compute Projected Depreciation	Accounting » Fixed Assets » Projections » Compute Projected Depreciation	Not in Costpoint Web
View Projected Depreciation Expense	Accounting » Fixed Assets » Projections » Projected Depreciation Expense Inquiry	Not in Costpoint Web
Print Projected Depreciation Report	Accounting » Fixed Assets » Projections » Print Projected Depreciation	Not in Costpoint Web
Manage Projected Asset Purchases	Accounting » Fixed Assets » Projections » Maintain Projected Asset Purchases	Not in Costpoint Web
Print Projected Asset Purchases Report	Accounting » Fixed Assets » Projections » Print Projected Asset Purchases	Not in Costpoint Web
Manage Projected Asset Disposals	Accounting » Fixed Assets » Projections » Maintain Projected Asset Disposals	Not in Costpoint Web
Print Projected Asset Disposals Report	Accounting » Fixed Assets » Projections » Print Projected Asset Disposals	Not in Costpoint Web

Fixed Assets Reports

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Fixed Assets Reports	Client/Server	Web
Print Asset Book Value Report	Accounting » Fixed Assets » Reports » Print Asset Book Value Report	Not in Costpoint Web

Print Asset Location Report	Accounting » Fixed Assets » Reports » Print Asset Location Report	Not in Costpoint Web
Print Comparative Book Data Report	Accounting » Fixed Assets » Reports » Print Comparative Book Data	Not in Costpoint Web
Print Depreciation Component Information by Book Report	Accounting » Fixed Assets » Reports » Print Depr Component Info by Book	Not in Costpoint Web
Print Fixed Assets/General Ledger Reconciliation Report	Accounting » Fixed Assets » Reports » Print FA/GL Reconciliation Report	Not in Costpoint Web
Print Schedule of Accumulated Depr Activity Report	Accounting » Fixed Assets » Reports » Print Schedule of Accum Depr Activity	Not in Costpoint Web
Print Schedule of Asset Activity Report	Accounting » Fixed Assets » Reports » Print Schedule of Asset Activity	Not in Costpoint Web

Fixed Assets Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Fixed Assets Utilities	Client/Server	Web
Compute/Update Depreciation Computation Data	Accounting » Fixed Assets » Utilities » Verify/Update Depr Computation Data	Not in Costpoint Web
Compute/Update Amount Taken Purchase Year-To-Date	Accounting » Fixed Assets » Utilities » Verify/Update Amt Taken Purchase YTD	Not in Costpoint Web
Compute/Update Fiscal Year-To-Date Amount	Accounting » Fixed Assets » Utilities » Miscellaneous Toolkits » Compute/Update FYTD Amount*	Not in Costpoint Web

Copy Transfer Data to Asset Audit Log	Accounting » Fixed Assets » Utilities » Miscellaneous Toolkits » Copy Transfer Data to Asset Audit Log*	Not in Costpoint Web
Update Current Depreciation Yr & Days/Pds Remaining	Accounting » Fixed Assets » Utilities » Miscellaneous Toolkits » Modify Current Depr Yr & Days/Pds Remaining*	Not in Costpoint Web
Update Current Period Depreciation Amount	Accounting » Fixed Assets » Utilities » Miscellaneous Toolkits » Update Current Pd Depr Amount*	Not in Costpoint Web
Update FY, Pd, and Subpd for Manual Disposals	Accounting » Fixed Assets » Utilities » Miscellaneous Toolkits » Update FY, Pd, and Subpd for Manual Disposals*	Not in Costpoint Web
Update the JE Required Flag in the Asset Audit Log	Accounting » Fixed Assets » Utilities » Miscellaneous Toolkits » Update the JE Req'd Flag in the Asset Audit Log*	Not in Costpoint Web
Configure Asset/Template Change Settings	Accounting » Fixed Assets » Asset/Template Changes » Asset/Template Change Settings	Not in Costpoint Web
Manage Template Global Changes	Accounting » Fixed Assets » Asset/Template Changes » Template Info Global Changes	Not in Costpoint Web
Manage Template User-Defined Global Changes	Accounting » Fixed Assets » Asset/Template Changes » Template UDF Info Global Changes	Not in Costpoint Web
Manage Asset Master Global Changes	Accounting » Fixed Assets » Asset/Template Changes » Asset Master Info Global Changes	Not in Costpoint Web
Manage Asset Master User-Defined Global Changes	Accounting » Fixed Assets » Asset/Template Changes » Asset Master UDF Info Global Changes	Not in Costpoint Web

View Template Change History	Accounting » Fixed Assets » Asset/Template Changes » Template Change History Inquiry	Not in Costpoint Web
View Asset Change History	Accounting » Fixed Assets » Asset/Template Changes » Asset Change History Inquiry	Not in Costpoint Web
Print Asset/Template Change History Report	Accounting » Fixed Assets » Asset/Template Changes » Print Change History	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Fixed Assets Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Fixed Assets Interfaces	Client/Server	Web
Import Asset Records	Not in Costpoint Client/Server	Not in Costpoint Web
Export Asset Records	Not in Costpoint Client/Server	Not in Costpoint Web
Import Asset Disposals	Not in Costpoint Client/Server	Not in Costpoint Web
Export Asset Disposals	Not in Costpoint Client/Server	Not in Costpoint Web
Export Bar Code Scanner Settings	Accounting » Fixed Assets » Bar Code Interface » Bar Code Settings	Not in Costpoint Web
Import Asset Locations	Accounting » Fixed Assets » Bar Code Interface » Asset Location Preprocessor	Not in Costpoint Web
Manage Asset Location Exceptions	Accounting » Fixed Assets » Bar Code Interface » Maintain Asset Location Exceptions	Not in Costpoint Web

Fixed Assets Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Fixed Assets Controls	Client/Server	Web
Configure Fixed Assets Settings	Accounting » Fixed Assets » Controls » Fixed Assets Settings	Not in Costpoint Web
Configure Posting Settings	Accounting » Fixed Assets » Controls » Posting Settings	Not in Costpoint Web
Manage Property Types	Accounting » Fixed Assets » Controls » Property Types	Not in Costpoint Web
Manage Classification Codes	Accounting » Fixed Assets » Controls » Classification Codes	Not in Costpoint Web
Manage Subclass Codes	Accounting » Fixed Assets » Controls » Subclass Codes	Not in Costpoint Web
Manage Depreciation Methods	Accounting » Fixed Assets » Controls » Depr Methods - Basic Setup	Not in Costpoint Web
Manage Accumulated Depreciation Account Codes	Accounting » Fixed Assets » Controls » Accum Depr Acct Codes	Not in Costpoint Web
Manage Depreciation Expense Acct Allocation Codes	Accounting » Fixed Assets » Controls » Depr Exp Acct Alloc Codes	Not in Costpoint Web
Manage Asset Master Field Labels	Accounting » Fixed Assets » Controls » Asset Master Field Labels	Not in Costpoint Web
Manage Tracking Field Labels	Accounting » Fixed Assets » Controls » Tracking Field Labels	Not in Costpoint Web

Manage Asset Master User-Defined Labels	Accounting » Fixed Assets » Controls » User-Defined Labels	Not in Costpoint Web
Manage Location 1 Codes	Accounting » Fixed Assets » Controls » Location 1 Codes	Not in Costpoint Web
Manage Location 2 Codes	Accounting » Fixed Assets » Controls » Location 2 Codes	Not in Costpoint Web
Manage Location 3 Codes	Accounting » Fixed Assets » Controls » Location 3 Codes	Not in Costpoint Web
Manage Location Groups	Accounting » Fixed Assets » Controls » Location Groups	Not in Costpoint Web
Manage Disposal Types	Accounting » Fixed Assets » Controls » Disposal Types	Not in Costpoint Web
Configure Autocreation Settings	Accounting » Fixed Assets » Autocreation of Asset Records » Autocreation Settings for PO/Rcvng Data	Not in Costpoint Web
Configure Default Autocreation Asset Numbering	Accounting » Fixed Assets » Autocreation of Asset Records » Default Autocreation Asset Numbering	Not in Costpoint Web
Manage Autocreation Accounts	Accounting » Fixed Assets » Autocreation of Asset Records » Autocreation Accounts	Not in Costpoint Web

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Fixed Assets » Administrative Utilities	Client/Server	Web
Purge All Asset Information	Accounting » Fixed Assets » Purge Fixed Assets Info » Purge All Asset Info	Not in Costpoint Web
Purge Posted Transactions Detail	Accounting » Fixed Assets » Purge Fixed Assets Info » Purge Posted Transactions Detail	Not in Costpoint Web
Purge Other Books Depreciation History	Accounting » Fixed Assets » Purge Fixed Assets Info » Purge Other Books Depr History	Not in Costpoint Web
Purge Asset/Template Change History	Accounting » Fixed Assets » Purge Fixed Assets Info » Purge Asset/Template Change History	Not in Costpoint Web

Consolidations

Consolidations Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Consolidations » Consolidations Processing	Client/Server	Web
Create Consolidation Entries	Accounting » Consolidations » Create Consolidation Entry	Not in Costpoint Web
Manage Consolidation Transfer History	Accounting » Consolidations » Consolidation Transfer History	Not in Costpoint Web

Create Project Summary Balances	Accounting » Consolidations » Create Project Data	Not in Costpoint Web
Import Consolidation Data	Accounting » Consolidations » Import Consolidation Data	Not in Costpoint Web
Copy Imported Consolidation Data to Permanent Tables	Accounting » Consolidations » Consolidation Preprocessor	Not in Costpoint Web
Manage Consolidation Suspense Entries	Accounting » Consolidations » Maintain Consolidation Suspense	Not in Costpoint Web
Create Elimination Entries	Accounting » Consolidations » Create Elimination Entry	Not in Costpoint Web

Consolidations Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Consolidations » Consolidations Utilities	Client/Server	Web
Update Consolidation Beginning Balances	Accounting » Consolidations » Update Consolidation Beginning Balances	Not in Costpoint Web

Consolidations Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Accounting » Consolidations » Consolidations Controls	Client/Server	Web
Configure Consolidation Settings	Accounting » Consolidations » Controls » Consolidation Settings	Not in Costpoint Web

Manage Consolidation Equity Accounts Override	Accounting » Consolidations » Controls » Consolidation Equity Accounts Override	Not in Costpoint Web
Manage Consolidation Acct/Org Mappings	Accounting » Consolidations » Controls » Consolidation Acct/Org Mappings	Not in Costpoint Web
Manage Transfer Locations	Accounting » Consolidations » Controls » Maintain Transfer Locations	Not in Costpoint Web
Link Consolidation Locations	Accounting » Consolidations » Controls » Link Consolidation Locations	Not in Costpoint Web

Projects

Project Setup

Project Master

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Project Master	Client/Server	Web
Manage Project User Flow	Projects » Project Setup » Project Master » Maintain Project Master Projects » Project Setup » Project Master » Basic Info	Projects » Maintain » Project » Project User Flow
Mass Add Project Master Data	Projects » Project Setup » Project Master » Mass Add Project Info	Projects » Maintain » Project » Mass Add Project Information
Manage Modifications	Projects » Project Setup » Project Master » Modifications	Projects » Transactions » Project » Enter Project Modifications
Manage Change Orders	Projects » Project Setup » Project Master » Enter Change Orders	Projects » Transactions » Project » Enter Project Change Orders
Manage User-Defined Information	Projects » Project Setup » Project Master » User-Defined Info	Projects » Maintain » Project » Project User-Defined Information
Manage Government Contract Information	Projects » Project Setup » Project Master » Government Contract Info	Projects » Maintain » Project » Project User Flow
Manage Standard Text	Projects » Project Setup » Project Master » Assign Standard Text	Projects » Maintain » Project » Project Standard Text Assignment
Manage Deliverables	Projects » Project Setup » Project Master » Deliverables	Projects » Transactions » Project » Enter Project Deliverables

Projects

Print Project Setup Report	Projects » Inquiry and Reporting » Initialization Reports » Print Project Setup Report	Not in Costpoint Web
Print Project Master Report	Projects » Inquiry and Reporting » Initialization Reports » Print Project Master Reports	Projects » Review » Initialization Reports » Project Master Reports
Print Project Exception Report	Projects » Inquiry and Reporting » Initialization Reports » Print Exception Reports	Not in Costpoint Web
Manage Project Templates	Not in Costpoint Client/Server	Projects » Configure » Project » Quick Project Setup Template
Manage Project Master Data	Not in Costpoint Client/Server	Projects » Maintain » Project » Quick Project Setup
Create Projects	Not in Costpoint Client/Server	Projects » Maintain » Project » Generate Quick Project WBS
Approve Projects	Not in Costpoint Client/Server	Projects » Maintain » Project » Approve Quick Projects
Import Project Master Data	Not in Costpoint Client/Server	Projects » Maintain » Project » Import Quick Project Information

Revenue

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Revenue	Client/Server	Web
Manage Revenue Information	Projects » Project Setup » Revenue Setup » Basic Revenue Info	Projects » Maintain » Revenue » Revenue Information
Manage Revenue Formulas	Projects » Project Setup » Revenue Setup » Maintain Revenue Formulas	Projects » Maintain » Revenue » Revenue Formulas

Print Project Revenue and Billing Formulas	Projects » Inquiry and Reporting » Initialization Reports » Print Project Formulas	Not in Costpoint Web
Manage Rate Sequence Orders	Projects » Project Setup » Revenue Setup » Define Rate Sequence	Projects » Maintain » Revenue » Define Rate Sequence
Manage Cost of Goods Sold	Projects » Project Setup » Revenue Setup » Cost of Goods Sold	Projects » Maintain » Project » Cost of Goods Sold

Project Ceilings

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Project Ceilings	Client/Server	Web
Manage Total Ceilings	Projects » Project Setup » Project Ceilings » Project Total Ceilings	Projects » Maintain » Project » Project User Flow
Manage Burden Cost Ceilings	Projects » Project Setup » Project Ceilings » Project Burden Cost Ceilings	Projects » Maintain » Ceilings and Overrides » Burden Cost Ceilings
Manage Direct Cost Ceilings	Projects » Project Setup » Project Ceilings » Project Direct Cost Ceilings	Projects » Maintain » Ceilings and Overrides » Direct Cost Ceilings
Manage Burden Fee Overrides	Projects » Project Setup » Revenue Setup » Maintain Burden Fee Overrides	Projects » Maintain » Ceilings and Overrides » Burden Fee Overrides
Manage Cost Fee Overrides	Projects » Project Setup » Revenue Setup » Maintain Cost Fee Overrides	Projects » Maintain » Ceilings and Overrides » Cost Fee Overrides
Manage Multiplier Overrides	Projects » Project Setup » Revenue Setup » Maintain Multiplier Overrides	Projects » Maintain » Ceilings and Overrides » Multiplier Overrides
Manage Hour Ceilings	Projects » Project Setup » Project Ceilings » Project Hours Ceilings	Projects » Maintain » Ceilings and Overrides » Direct Hour Ceilings

Projects

Manage Employee Hour Ceilings	Projects » Project Setup » Project Ceilings » Project Employee Hours Ceilings	Projects » Maintain » Ceilings and Overrides » Employee Hour Ceilings
Manage Vendor Hour Ceilings	Projects » Project Setup » Project Ceilings » Project Vendor Hours Ceilings	Projects » Maintain » Ceilings and Overrides » Vendor Hour Ceilings

Project Labor

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Project Labor	Client/Server	Web
Manage Project Labor Categories (PLC)	Projects » Project Setup » Project Labor » Set Up Project Labor Categories (PLC)	Projects » Maintain » Labor Categories » Project Labor Categories (PLCs)
Link Project Labor Categories to Projects	Projects » Project Setup » Project Labor » Assign PLC to Projects	Projects » Maintain » Labor Categories » Assign PLCs
Link Project Labor Category Rates to Projects	Projects » Project Setup » Project Labor » Project PLC Rates	Projects » Maintain » Labor Categories » Project PLC Rates
Manage Employee Work Force	Projects » Project Setup » Project Labor » Project Employee Work Force	Projects » Maintain » Labor Categories » Employee Work Force
Manage Vendor Work Force	Projects » Project Setup » Project Labor » Project Vendor Work Force	Projects » Maintain » Labor Categories » Vendor Work Force
Manage Vendor Employee Work Force	Projects » Project Setup » Project Labor » Project Vendor Employee Work Force	Not in Costpoint Web
Link PLC Rates to Employee/Vendor	Projects » Project Setup » Project Labor » Project PLC Rates by Employee/Vendor	Projects » Maintain » Project » Project User Flow
Print Project Work Force Report	Projects » Inquiry and Reporting » Initialization Reports » Print Project Work Force	Projects » Review » Initialization Reports » Project Work Force Report

Alternate Projects

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Alternate Projects	Client/Server	Web
Manage Alternate Projects	Projects » Project Setup » Alternate Reporting	Not in Costpoint Web

Charging Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Charging Information	Client/Server	Web
Link Projects/Accounts	Projects » Project Setup » Controls » Maintain Project/Account Validation	Projects » Maintain » Project » Project/Account Links
Link Projects/Accounts/Organizations	Projects » Project Setup » Project Master » Maintain Valid Project/Account/Orgs	Projects » Maintain » Project » Project/Account/Organization Links
Mass Link Projects/Accounts/Organizations	Projects » Project Setup » Project Master » Mass Link Projects/Accounts/Organizations	Projects » Maintain » Project » Mass Link Projects/Accounts/Organizations
Link Projects/Organizations	Projects » Project Setup » Controls » Maintain Project/Organization Validation	Projects » Maintain » Project » Project/Organization Links

Unit Pricing Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Unit Pricing Information	Client/Server	Web
Manage CLIN Information	Projects » Project Setup » Unit Pricing » CLIN Information	Projects » Maintain » Project » CLINs

Project History

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Project History	Client/Server	Web
Manage Project Labor History	Projects » Project Setup » Project History » Maintain Labor Summary	Projects » Configure » Project History » Maintain Labor Summary
Manage Prior Year Cost and Revenue	Projects » Project Setup » Project History » Prior Year Cost and Revenue	Not in Costpoint Web
Manage Prior Year Cobra Costs	Others » Product Interfaces » Cobra Interface » Maintain Prior Year Cobra Costs	Not in Costpoint Web
Manage Prior Year Time and Materials Revenue	Projects » Project Setup » Project History » Prior Year T&M Revenue	Not in Costpoint Web
Manage Prior Year Billable Value	Projects » Project Setup » Project History » Prior Year Billable Value Amounts	Not in Costpoint Web
Manage Prior Year Unit Revenue	Projects » Project Setup » Project History » Prior Year Unit Revenue	Not in Costpoint Web

Project Setup Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Project Setup Utilities	Client/Server	Web
Activate/Inactive Projects	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Activate/Inactivate Project*	Not in Costpoint Web
Update Project Contract and Funded Values	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Update Contract and Funded Values*	Not in Costpoint Web
Update Project Period of Performance	8Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Update Period of Performance*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Project Setup Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Project Setup Interfaces	Client/Server	Web
Import Project Master Data	Projects » Project Setup » Project Master » Upload Project Information	Projects » Utilities » Import » Import Project Information

Project Setup Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Project Setup Controls	Client/Server	Web
Configure Project Settings	Projects » Project Setup » Controls » Project Settings	Administration » Configure » Project » Project Settings
Manage Project Account Groups	Projects » Project Setup » Controls » Project Account Groups	Projects » Configure » Project » Project Account Groups
Print Project Account Group Setup Report	Projects » Inquiry and Reporting » Initialization Reports » Print Project Account Group Setup Report	Not in Costpoint Web
Manage Project Types	Projects » Project Setup » Controls » Maintain Project Types	Projects » Configure » Project » Project Types
Manage User-Defined Labels	Projects » Project Setup » Controls » Project User-Defined Labels	Not in Costpoint Web
Manage Change Order Status	Projects » Project Setup » Controls » Maintain Change Order Statuses	Projects » Configure » Project » Project Change Order Statuses
Manage Project Account Group Mappings	Not in Costpoint Client/Server	Projects » Configure » Project » Quick Project Account Group Mapping
Manage Project Organization Mappings	Not in Costpoint Client/Server	Projects » Configure » Project » Quick Project Organization Mapping
Manage Project Approver Settings	Not in Costpoint Client/Server	Projects » Configure » Project » Quick Project Approver Settings

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Setup » Administrative Utilities	Client/Server	Web
Check and/or Rebuild Project Segment IDs	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Check and/or Rebuild Project Segment IDs*	Not in Costpoint Web
Purge Project and Billing Information	Projects » Cost and Revenue Processing » Utilities » Purge Project and Billing Information	Not in Costpoint Web
Set Project Level Correctly in Project Master	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Set Level Correctly in Project Master*	Not in Costpoint Web
Synchronize Project Master Data and Project Edit Data	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Synchronize Project Master and Project Edit Tables*	Not in Costpoint Web
Update POA Table with Valid Links/Reference Numbers	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Update POA table with valid Links/Reference Numbers*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Advanced Project Budgeting

Burden Templates

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Advanced Project Budgeting » Burden Templates	Client/Server	Web
Manage Burden Templates	Projects » Advanced Project Budgeting » Controls » Maintain Burden Templates	Not in Costpoint Web
Import Pools to Burden Templates	Projects » Advanced Project Budgeting » Controls » Import Pools to Burden Template	Not in Costpoint Web
Build Budget Composite Rates	Projects » Advanced Project Budgeting » Controls » Build Budget Composite Rates	Not in Costpoint Web

Project Budget and Estimate To Complete

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Advanced Project Budgeting » Project Budget and Estimate To Complete	Client/Server	Web
Manage Project Budget Revisions	Projects » Advanced Project Budgeting » Controls » Maintain Project Budget Revisions	Not in Costpoint Web
Manage Change Orders	Projects » Project Setup » Project Master » Enter Change Orders	Projects » Transactions » Project » Enter Project Change Orders
Manage Project Budgets and ETC	Projects » Advanced Project Budgeting » Project Budget and ETC Master » Maintain Project Budgets and ETC	Not in Costpoint Web

Mass Add Project Budgets	Projects » Advanced Project Budgeting » Project Budget and ETC Master » Mass Add Project Budgets	Not in Costpoint Web
Update Incurred Costs for Project Budgets	Projects » Advanced Project Budgeting » Project Budget and ETC Master » Update Incurred Costs for Project Budgets	Not in Costpoint Web
Update Project Budgets	Projects » Advanced Project Budgeting » Project Budget and ETC Master » Project Budget Recalculation	Not in Costpoint Web
Compute Estimate to Complete	Projects » Advanced Project Budgeting » Project Budget and ETC Master » Revise Estimate to Complete	Not in Costpoint Web
Create PSR Budget Report Tables	Projects » Advanced Project Budgeting » Project Budget and ETC Master » Create PSR Budget Report Tables	Not in Costpoint Web

Project Budget Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Advanced Project Budgeting » Project Budget Reports/Inquiries	Client/Server	Web
Print Earned Value Report	Projects » Advanced Project Budgeting » Project Budget Reporting » Print Earned Value	Not in Costpoint Web
Print Estimate To Complete Report	Projects » Advanced Project Budgeting » Project Budget Reporting » Print Estimate to Complete	Not in Costpoint Web
Print Labor Estimate To Complete Report	Projects » Advanced Project Budgeting » Project Budget Reporting » Print Labor Estimate to Complete	Not in Costpoint Web

Print Project Budget Detail Report	Projects » Advanced Project Budgeting » Project Budget Reporting » Print Project Budget Detail	Not in Costpoint Web
Print Project Budget Summary Report	Projects » Advanced Project Budgeting » Project Budget Reporting » Print Project Budget Summary	Not in Costpoint Web
View ETC and Earned Value	Projects » Advanced Project Budgeting » Project Budget Inquiry » ETC and Earned Value	Not in Costpoint Web
View Project Budgets	Projects » Advanced Project Budgeting » Project Budget Inquiry » Project Budgets	Not in Costpoint Web

Advanced Project Budget Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Advanced Project Budgeting » Advanced Project Budget Controls	Client/Server	Web
Configure Project Budget Settings	Projects » Advanced Project Budgeting » Controls » Maintain Project Budget Settings	Not in Costpoint Web
Manage Average Cost GLC Rates	Projects » Advanced Project Budgeting » Controls » Maintain Average Cost GLC Rates	Not in Costpoint Web
Manage Average Cost PLC Rates	Projects » Advanced Project Budgeting » Controls » Maintain Average Cost PLC Rates	Not in Costpoint Web
Manage Period Days	Projects » Advanced Project Budgeting » Controls » Maintain Period Days	Not in Costpoint Web

Budgeting and ETC

Total Budgets

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Total Budgets	Client/Server	Web
Manage Project Total Budget	Projects » Budgeting and ETC » Total Budgets » Project Total Budget	Not in Costpoint Web
Manage PLC Total Budget	Projects » Budgeting and ETC » Total Budgets » PLC Total Budget	Not in Costpoint Web
Manage GLC Total Budget	Projects » Budgeting and ETC » Total Budgets » GLC Total Budget	Not in Costpoint Web
Update Budget Report Tables	Projects » Budgeting and ETC » Total Budgets » Maintain Budget Report Tables	Projects » Process » Budgets and ETCs » Create Budget Report Tables

Period Budgets

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Period Budgets	Client/Server	Web
Manage Budget Revisions	Projects » Budgeting and ETC » Period Budgets » Maintain Budget Revisions	Not in Costpoint Web
Manage Project Budgets By Period	Projects » Budgeting and ETC » Period Budgets » Project Budgets by Period	Not in Costpoint Web
Manage PLC Budgets By Period	Projects » Budgeting and ETC » Period Budgets » PLC Budgets by Period	Not in Costpoint Web

Projects

Manage GLC Budgets By Period	Projects » Budgeting and ETC » Period Budgets » GLC Budgets by Period	Not in Costpoint Web
Manage Project Unit Budgets By Period	Projects » Budgeting and ETC » Period Budgets » Project Unit Budgets by Period	Not in Costpoint Web
Apply Indirect Costs to Budgets	Projects » Budgeting and ETC » Period Budgets » Apply Indirect Costs to Budgets	Not in Costpoint Web
Update Project Total Budget	Projects » Budgeting and ETC » Period Budgets » Update Project Total Budget	Not in Costpoint Web

Estimate To Complete

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Estimate To Complete	Client/Server	Web
Manage Estimate To Complete Amounts	Projects » Budgeting and ETC » Estimate to Complete » Maintain Estimate-to-Complete Amounts	Not in Costpoint Web
Update Incurred Cost for ETC	Projects » Budgeting and ETC » Estimate to Complete » Update Incurred Cost for ETC	Not in Costpoint Web
Compute Estimate To Complete	Projects » Budgeting and ETC » Estimate to Complete » Revise ETC	Not in Costpoint Web
Manage Estimate to Complete PLC Hours	Projects » Budgeting and ETC » Estimate to Complete » Maintain Estimate-to-Complete PLC Hours	Not in Costpoint Web
Manage Estimate To Complete GLC Hours	Projects » Budgeting and ETC » Estimate to Complete » Maintain Estimate-to-Complete GLC Hours	Not in Costpoint Web

Encumbrance Tracking

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Encumbrance Tracking	Client/Server	Web
Manage Project Budget Line Item Revisions	Projects » Budgeting and ETC » Encumbrance Tracking » Maintain Project Budget Line Item Revisions	Not in Costpoint Web
Manage Project Line Item Budgets	Projects » Budgeting and ETC » Encumbrance Tracking » Maintain Project Line Item Budgets	Not in Costpoint Web
Compute Over Budget Transactions	Projects » Budgeting and ETC » Encumbrance Tracking » Calculate Over Budget Transactions	Projects » Process » Encumbrance Tracking » Calculate Over-Budget Transactions

Cost Schedule Status Report

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Cost Schedule Status Report	Client/Server	Web
Manage CSSR Information	Projects » Budgeting and ETC » Maintain C/SSRs » Maintain C/SSR Information	Not in Costpoint Web
Manage CSSR Budgets	Projects » Budgeting and ETC » Maintain C/SSRs » Maintain C/SSR Budgets	Not in Costpoint Web
Import CSSR Budgets	Projects » Budgeting and ETC » Maintain C/SSRs » Upload C/SSR Budgets	Not in Costpoint Web
Create CSSR Report Tables	Projects » Budgeting and ETC » Maintain C/SSRs » Create C/SSR Report Tables	Not in Costpoint Web

Print Cost Schedule Status Report	Projects » Budgeting and ETC » Maintain C/SSRs » Print C/SSR	Not in Costpoint Web
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Estimate To Complete Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Estimate To Complete Reports/Inquiries	Client/Server	Web
Create Estimate To Complete Report Tables	Projects » Budgeting and ETC » Estimate to Complete Reporting & Inquiry » Create ETC Report Tables	Projects » Process » Budgets and ETCs » Create Estimate-to-Complete Report Tables
Print Estimate To Complete Hours Report	Projects » Budgeting and ETC » Estimate to Complete Reporting & Inquiry » Print ETC Hours Report	Not in Costpoint Web
Print Estimate To Complete Report	Projects » Budgeting and ETC » Estimate to Complete Reporting & Inquiry » Print ETC Report	Not in Costpoint Web
View Estimate To Complete	Projects » Budgeting and ETC » Estimate to Complete Reporting & Inquiry » ETC Inquiry	Not in Costpoint Web

Budget Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Budget Interfaces	Client/Server	Web
Configure Interface Settings*	Others » Product Interfaces » Project Planner Interface » Interface Configuration	Not in Costpoint Web

Projects

Configure Project Planner Mapping Definitions*	Others » Product Interfaces » Project Planner Interface » Interface Configuration	Not in Costpoint Web
Import Project Budgets	Others » Product Interfaces » Project Planner Interface » Import Project Budgets	Not in Costpoint Web
Retrieve Labor Rates	Others » Product Interfaces » CRM/Gov Win/RP Integration » Retrieve Labor Rates Others » Product Interfaces » Project Planner Interface » Retrieve Labor Rates	Not in Costpoint Web

* In Costpoint 7.0, the Interface Configuration screen was split into two screens: Interface Configuration and Configure Project Planner Mapping Definitions.

Budget Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Budgeting and ETC » Budget Controls	Client/Server	Web
Manage Average GLC Rates	Projects » Budgeting and ETC » Budget Setup » Maintain Average GLC Rates	Not in Costpoint Web
Manage Average PLC Rates	Projects » Budgeting and ETC » Budget Setup » Maintain Average PLC Rates	Not in Costpoint Web

Cost and Revenue Processing

Cost Pools

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Cost Pools	Client/Server	Web
Manage Cost Pools	Projects » Cost and Revenue Processing » Cost Pool Setup » Cost Pools	Projects » Maintain » Allocations » Cost Pools
Manage Base Creation Setups	Projects » Cost and Revenue Processing » Cost Pool Setup » Base Creation Setup	Projects » Maintain » Allocations » Pool Base Creation
Manage Cost Creation Setups	Projects » Cost and Revenue Processing » Cost Pool Setup » Cost Creation Setup	Projects » Maintain » Allocations » Pool Cost Creation
Create Pool Links	Projects » Cost and Revenue Processing » Cost Pool Setup » Create Pool Links	Projects » Process » Allocations » Create Pool Links
Print Cost Pool Rates Report	Projects » Inquiry and Reporting » Initialization Reports » Print Pool Rate Listing	Projects » Review » Initialization Reports » Pool Rate Listing Report
Print Cost Pool Setup Report	Projects » Inquiry and Reporting » Initialization Reports » Print Pool Setup	Projects » Review » Initialization Reports » Pool Setup Report
Print Service Center Setup Report	Projects » Inquiry and Reporting » Initialization Reports » Print Service Center Setup	Not in Costpoint Web

Cost Pool Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Cost Pool Processing	Client/Server	Web
Build Rate Application Table	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Build Rate Application Table	Projects » Process » Allocations » Build Rate Application Table
Compute/Print Pool Rates	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Compute & Print Pool Rates	Projects » Process » Allocations » Compute and Print Pool Rates
Import Allocation Basis Journals	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Upload Allocation Basis Journal	Projects » Utilities » Import » Import Allocation Basis Journal
Manage Allocation Journals	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Maintain Allocation Journal	Projects » Transactions » Allocations » Maintain Allocation Journal
Print Allocation Journal Edit Report	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Print Allocation Journal Edit Report	Projects » Review » Allocations » Allocation Journal Edit Report
Print Service Center Cost Allocation Report	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Print Service Center Cost Allocation Report	Not in Costpoint Web
Post Pool Journals	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Post Pool Journal	Projects » Process » Post » Post Pool Journal
Reverse Posted Pool and Revenue Journals	Projects » Cost and Revenue Processing » Utilities » Reverse Posted Pool and Revenue Journals	Not in Costpoint Web

Multi-Job Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Multi-Job Processing	Client/Server	Web
Manage Multi-Job Allocation Information	Projects » Cost and Revenue Processing » Cost Pool Setup » Multi-Job Allocation Setup	Projects » Maintain » Allocations » Multi-Job Allocation Setup
Import Multi-Job Allocation Percentage Basis	Projects » Cost and Revenue Processing » Cost Pool Setup » Upload Multi-Job Allocation Percentage Basis	Not in Costpoint Web
Create Multi-Job Allocation Entries	Projects » Cost and Revenue Processing » Project Cost Processing » Compute Multi-Job Allocations	Projects » Process » Allocations » Compute Multi-Job Allocations
Manage Multi-Job Allocation Cost History	Projects » Cost and Revenue Processing » Cost Pool History » Multi-Job Allocation Cost History	Projects » Configure » Allocations » Multi-Job Allocation Cost History
Manage Multi-Job Allocation Labor History	Projects » Cost and Revenue Processing » Cost Pool History » Multi-Job Allocation Labor History	Projects » Configure » Allocations » Multi-Job Allocation Labor History

Project Cost Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Project Cost Processing	Client/Server	Web
Process Organization Changes	Projects » Cost and Revenue Processing » Utilities » Process Organization Changes	Projects » Process » Project » Process Organization Changes

Projects

Create Cost of Goods Sold Entries	Projects » Cost and Revenue Processing » Project Cost Processing » Compute Cost of Goods Sold Entry	Projects » Process » Project » Compute Cost of Goods Sold Entry
Compute Burden Costs	Projects » Cost and Revenue Processing » Project Cost Processing » Compute Burden Cost	Projects » Process » Project » Compute Burden Cost
Compute Cobra Burden Costs	Others » Product Interfaces » Cobra Interface » Compute Cobra Burden Cost	Not in Costpoint Web
Compute Inventory Burden Rates	Projects » Cost and Revenue Processing » Cost Pool Processing & Reporting » Compute Inventory Burden Rates	Projects » Process » Allocation » Compute Inventory Burden Rates

Revenue Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Revenue Processing	Client/Server	Web
Load Labor Rates	Projects » Cost and Revenue Processing » Revenue Processing » Load Labor Rates Projects » Billing » Prepare Billings » Load Labor Rates	Projects » Process » Billing » Load Labor Rates
Compute Revenue	Projects » Cost and Revenue Processing » Revenue Processing » Compute Revenue	Projects » Process » Revenue » Compute Revenue
Redistribute Revenue	Projects » Cost and Revenue Processing » Revenue Processing » Redistribute Revenue	Projects » Process » Revenue » Redistribute Revenue
Redistribute Revenue by Project	Projects » Cost and Revenue Processing » Revenue Processing » Redistribute Revenue by Project	Projects » Process » Revenue » Redistribute Revenue by Project

Projects

Post Revenue	Projects » Cost and Revenue Processing » Revenue Processing » Post Revenue	Projects » Process » Post » Post Revenue
Reverse Posted Pool and Revenue Journals	Projects » Cost and Revenue Processing » Utilities » Reverse Posted Pool and Revenue Journals	Not in Costpoint Web
Create Cost Transfer Journal Entries	Projects » Cost and Revenue Processing » Revenue Processing » Create Cost Transfer Journal Entry	Projects » Process » Project » Create Cost Transfer Journal Entry

Project Transfer Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Project Transfer Processing	Client/Server	Web
Manage Project Transfer Information	Projects » Cost and Revenue Processing » Project Transfer » Project Transfer Setup	Projects » Maintain » Allocations » Project Transfer Setup
Create Project Transfer Journal Entries	Projects » Cost and Revenue Processing » Project Transfer » Compute Project Transfer	Projects » Process » Allocations » Compute Project Transfer
Update Project Transfer History Tables	Projects » Cost and Revenue Processing » Project Transfer » Update Project Transfer History Tables	Projects » Process » Project » Update Project Transfer History Tables

Goal Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Goal Processing	Client/Server	Web
Compute Billing Value of Cost Incurred	Projects » Cost and Revenue Processing » Revenue Processing » Compute Billing Value of Cost Incurred	Projects » Process » Revenue » Compute Billing Value of Cost Incurred

Cost and Revenue Processing Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Cost and Revenue Processing Utilities	Client/Server	Web
Copy Pools	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Copy Pools*	Not in Costpoint Web
Purge Allocation Basis Journal History	Projects » Cost and Revenue Processing » Utilities » Purge Allocation Basis Journal History	Projects » Utilities » Purge » Purge Allocation Basis Journal History
Validate Pool Acct/Org Setups	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Check Pool Acct/Org Setups*	Not in Costpoint Web
View Invalid Pools in Project Ledger	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Display Invalid Pools in Project Ledger*	Not in Costpoint Web
Repair Invalid Pools in Project Ledger	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Fix Invalid Pools in Project Ledger*	Not in Costpoint Web

Projects

Assign Account Function Codes	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Assign Account Function Codes*	Not in Costpoint Web
Change Period Report Parameters	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Change Period Report Parameters*	Not in Costpoint Web
Check for Unposted Journals	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Check for Unposted Journals*	Not in Costpoint Web
Compare Project Ledger to General Ledger	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Compare Project Ledger to General Ledger*	Not in Costpoint Web
Summarize Project Goal Detail	Projects » Cost and Revenue Processing » Utilities » Summarize Project Goal Detail	Projects » Utilities » Project Toolkits » Summarize Project Goal Detail
Summarize Project Ledger	Projects » Cost and Revenue Processing » Utilities » Summarize Project Ledger	Not in Costpoint Web
Apply Indirect Costs to Summarized Project Ledger	Projects » Cost and Revenue Processing » Utilities » Apply Indirect Costs	Projects » Utilities » Project Toolkits » Apply Indirect Costs to Summarized Project Ledger
Update Prior Year History	Projects » Project Setup » Project History » Update Prior Year History	Projects » Utilities » Project Toolkits » Update Project Prior Year History

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Cost and Revenue Processing Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Cost and Revenue Processing Interfaces	Client/Server	Web
Manage Microframe EOC Mappings	Others » Product Interfaces » Microframe Interface » Microframe EOC Mappings	Not in Costpoint Web
Manage Microframe OBS Mappings	Others » Product Interfaces » Microframe Interface » Microframe OBS Mappings	Not in Costpoint Web
Manage Microframe WBS Mappings	Others » Product Interfaces » Microframe Interface » Microframe WBS Mappings	Not in Costpoint Web
Manage Microframe Resource Mappings	Others » Product Interfaces » Microframe Interface » Microframe Resource Mappings	Not in Costpoint Web
Create Microframe Transfer Files	Others » Product Interfaces » Microframe Interface » Microframe Transfer	Not in Costpoint Web

Cost Pool Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Cost Pool Controls	Client/Server	Web
Manage Allocation Groups	Projects » Cost and Revenue Processing » Cost Pool Setup » Allocation Groups	Projects » Configure » Allocations » Allocation Groups
Manage Pool Processing Sequence Numbers	Projects » Cost and Revenue Processing » Cost Pool Setup » Set Pool Processing Sequence	Projects » Maintain » Allocations » Pool Processing Sequence

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Cost and Revenue Processing » Administrative Utilities	Client/Server	Web
Group Duplicates in Labor History	Projects » Cost and Revenue Processing » Utilities » Miscellaneous Toolkits » Group Duplicates in Labor History*	Not in Costpoint Web
Rebuild Labor History	Projects » Cost and Revenue Processing » Utilities » Rebuild Labor History	Not in Costpoint Web
Synchronize Project Performance Tables	Projects » Cost and Revenue Processing » Utilities » Synchronize Project Performance Tables	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Project Inquiry and Reporting

Report Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Inquiry and Reporting » Report Processing	Client/Server	Web
Compute/Print Purchasing Commitments	Projects » Inquiry and Reporting » Report Processing » Compute and Print Commitments	Projects » Process » Project » Compute and Print Purchasing Commitments
Update Project Status Report Tables	Projects » Inquiry and Reporting » Report Processing » Update Project Status Report Table	Projects » Process » Project » Update Project Status Report Table

Create Project Report Tables	Projects » Inquiry and Reporting » Report Processing » Create Project Report Tables	Projects » Process » Project » Update Other Project Report Tables
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Project Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Project Inquiry and Reporting » Project Reports/Inquiries	Client/Server	Web
Print Organization Cost Summary Report	Projects » Inquiry and Reporting » Project Reporting » Print Organization Cost Summary	Projects » Review » Project » Organization Cost Summary Report
Print Project Labor Summary Report	Projects » Inquiry and Reporting » Project Reporting » Print Project Labor Summary	Projects » Review » Project » Project Labor Summary Report
Print Project Non-Labor Detail Report	Projects » Inquiry and Reporting » Project Reporting » Print Project Non-Labor Detail	Projects » Review » Project » Project Non-Labor Detail Report
Print Project Status Report	Projects » Inquiry and Reporting » Project Reporting » Print Project Status Report	Projects » Review » Project » Project Status Report
Print Revenue Summary Report	Projects » Inquiry and Reporting » Project Reporting » Print Revenue Summaries	Projects » Review » Project » Revenue Summary Report
Print Revenue Worksheet	Projects » Inquiry and Reporting » Project Reporting » Print Revenue Worksheet	Projects » Review » Project » Revenue Worksheet
Print T&M Analysis Report	Projects » Inquiry and Reporting » Project Reporting » Print T&M Analysis	Projects » Review » Project » T&M Analysis Report
View Project Activity	Projects » Inquiry and Reporting » Inquiry » Project Inquiry	Projects » Review » Project » Project Inquiry
View Project Activity by Level	Projects » Inquiry and Reporting » Inquiry » Project Inquiry by Level	Projects » Review » Project » Project Inquiry by Level

View Project Ledger Activity	Projects » Inquiry and Reporting » Inquiry » Project Ledger Inquiry	Projects » Review » Project » Project Ledger Inquiry
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Billing

Billing Formats

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Billing Formats	Client/Server	Web
Manage Generic Billing Formats	Projects » Billing » Formats » Generic Billing Formats	Projects » Maintain » Billing » Generic Billing Formats
Manage Supporting Schedule Formats	Projects » Billing » Formats » Supporting Schedule Formats	Projects » Maintain » Billing » Supporting Schedule Formats

Billing Master

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Billing Master	Client/Server	Web
Manage Project Billing Information	Projects » Billing » Billing Master » Project Billing Info	Projects » Maintain » Billing » Project Billing Information
Manage ACRN Bills	Projects » Billing » Billing Master » Maintain ACRN Bills	Projects » Maintain » Billing » Maintain ACRN Bills
Manage Project Sales Tax Setups	Projects » Billing » Billing Master » Project Sales Tax Setup	Not in Costpoint Web
Manage Account Discounts	Projects » Billing » Billing Master » Maintain Account Discounts	Projects » Maintain » Billing » Account Discounts

Manage Customer Volume Discounts	Projects » Billing » Billing Master » Maintain Customer Volume Discounts	Projects » Maintain » Billing » Customer Volume Discounts
Manage Project Volume Discounts	Projects » Billing » Billing Master » Maintain Project Volume Discounts	Projects » Maintain » Billing » Project Volume Discounts
Manage Project WAWF Information	Projects » Billing » Billing Master » Maintain Project WAWF Information	Projects » Maintain » Billing » Project WAWF Information

Units Usage Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Units Usage Processing	Client/Server	Web
Manage Unit Usage	Projects » Billing » Units Usage » Enter Unit Usage	Projects » Transactions » Units » Enter Units Usage
Import Units Usage Files	Projects » Billing » Units Usage » Upload Unit Usage Data	Projects » Utilities » Import » Import Units Usage Data
Print Usage Edit Report	Projects » Billing » Units Usage » Print Usage Edit Report	Projects » Transactions » Units » Units Usage Edit Report
Post Unit Usage	Projects » Billing » Units Usage » Post Unit Usage	Projects » Process » Post » Post Units Usage
Manage Units Usage History	Projects » Billing » Units Usage » Maintain Units Usage History	Not in Costpoint Web
Print Units Usage History Report	Projects » Billing » Units Usage » Print Units Usage History Report	Projects » Configure » Units History » Units Usage History Report

Standard Bill Adjustments

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Standard Bill Adjustments	Client/Server	Web
Manage Open Billing Detail	Projects » Billing » Prepare Billings » Maintain Open Billing Detail	Projects » Maintain » Billing » Open Billing Detail
Adjust Open Billing Detail Records	Projects » Billing » Prepare Billings » Adjustments in Open Billing Detail	Projects » Process » Billing » Adjust Open Billing Detail

Standard Bills Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Standard Bills Processing	Client/Server	Web
Load Labor Rates	Projects » Cost and Revenue Processing » Revenue Processing » Load Labor Rates Projects » Billing » Prepare Billings » Load Labor Rates	Projects » Process » Billing » Load Labor Rates
Load Multicurrency Transaction Amounts	Not in Costpoint Client/Server	Not in Costpoint Web
Update Cash Basis Information	Projects » Billing » Prepare Billings » Update Cash Basis Information	Projects » Process » Billing » Update Cash Basis Bills
Calculate Standard Bills	Projects » Billing » Calculate Billings » Calculate Billings	Projects » Process » Billing » Calculate Bills
Manage Standard Bills	Projects » Billing » Edit Billings » Edit Standard Bills	Projects » Transactions » Billing » Edit Standard Bills

Projects

Select Bills for Posting	Projects » Billing » Edit Billings » Select Bills for Posting	Projects » Transactions » Billing » Select Bills for Posting
Calculate ACRN Bills	Projects » Billing » Calculate Billings » Calculate ACRN Billings	Projects » Process » Billing » Calculate ACRN Bills
Print ACRN Billing Edit Report	Projects » Billing » Print Billings » Print ACRN Billing Edit Report	Projects » Transactions » Billing » Print ACRN Billing Edit Report
Print Standard Bills	Projects » Billing » Print Billings » Print Standard Bills	Projects » Transactions » Billing » Print Standard Bills
Print Form 1034	Projects » Billing » Print Billings » Print Form 1034	Projects » Transactions » Billing » Print Form 1034
Print Indirect Rate Retroactive Billing Schedule	Not in Costpoint Client/Server	Not in Costpoint Web
Create WAWF Billing Files	Projects » Billing » Print Billings » Create WAWF Billing Files	Projects » Process » Billing » Create WAWF Billing Files
Post Standard Bills	Projects » Billing » Post Billings » Post Standard Bills	Projects » Process » Post » Post Standard Bills
Reverse Previous Bills	Projects » Billing » Calculate Billings » Reverse Previous Billings	Projects » Process » Billing » Reverse Previous Bills
Calculate Retroactive Bills	Projects » Billing » Calculate Billings » Calculate Retroactive Billings	Projects » Process » Billing » Calculate Retroactive Bills
Print Retroactive Billing Worksheet	Projects » Billing » Print Billings » Print Retroactive Billing Worksheets	Projects » Transactions » Billing » Print Retroactive Bill Worksheets

Progress Payment Bills Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Progress Payment Bills Processing	Client/Server	Web
Load Labor Rates	Projects » Cost and Revenue Processing » Revenue Processing » Load Labor Rates Projects » Billing » Prepare Billings » Load Labor Rates	Projects » Process » Billing » Load Labor Rates
Update Subcontractor Progress Payments	Projects » Billing » Prepare Billings » Update Subcontractor Progress Payments	Not in Costpoint Web
Calculate Progress Payment Bills	Projects » Billing » Calculate Billings » Calculate Progress Payment Billings	Projects » Process » Billing » Calculate Progress Payment Bills
Manage Progress Payment Bills	Projects » Billing » Edit Billings » Edit Progress Payment Billings	Projects » Transactions » Billing » Edit Progress Payment Bills
Print Progress Payment Bills	Projects » Billing » Print Billings » Print Progress Payment Bills	Projects » Transactions » Billing » Print Progress Payment Bills
Post Progress Payment Bills	Projects » Billing » Post Billings » Post Progress Payment Bills	Projects » Process » Post » Post Progress Payment Bills

Milestone Percent Complete Bills Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Milestone Percent Complete Bills Processing	Client/Server	Web
Manage Milestone Percent Complete Bills	Projects » Billing » Edit Billings » Edit Milestone/Percent Complete Bills	Projects » Transactions » Billing » Enter Milestone/Percent Complete Bills

Print Milestone Percent Complete Bills	Projects » Billing » Print Billings » Print Milestone/Percent Complete Bills	Projects » Transactions » Billing » Print Milestone/Percent Complete Bills
Post Milestone Percent Complete Bills	Projects » Billing » Post Billings » Post Milestone/Percent Complete Bills	Projects » Process » Post » Post Milestone/Percent Complete Bills

Project Product Bills Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Project Product Bills Processing	Client/Server	Web
Manage Project Product Bills	Projects » Billing » Edit Billings » Edit Project Product Bills	Projects » Transactions » Billing » Enter Project Product Bills
Print Project Product Bills	Projects » Billing » Print Billings » Print Project Product Bills	Projects » Transactions » Billing » Print Project Product Bills
Post Project Product Bills	Projects » Billing » Post Billings » Post Project Product Bills	Projects » Process » Post » Post Project Product Bills

Manual Bills Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Manual Bills Processing	Client/Server	Web
Manage Manual Bills	Projects » Billing » Edit Billings » Edit Manual Bills	Projects » Transactions » Billing » Enter Manual Bills
Post Manual Bills	Projects » Billing » Post Billings » Post Manual Bills	Projects » Process » Post » Post Manual Bills

Customer Product Bills Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Customer Product Bills Processing	Client/Server	Web
Manage Customer Product Bills	Projects » Billing » Edit Billings » Edit Customer Product Bills	Projects » Transactions » Billing » Enter Customer Product Bills
Print Customer Product Bills	Projects » Billing » Print Billings » Print Customer Product Bills	Projects » Transactions » Billing » Print Customer Product Bills
Post Customer Product Bills	Projects » Billing » Post Billings » Post Customer Product Bills	Projects » Process » Post » Post Customer Product Bills

Unbilled Receivables

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Unbilled Receivables	Client/Server	Web
Manage Unbilled Reason Codes	Projects » Billing » Unbilled Receivables » Maintain Unbilled Reason Codes	Projects » Transactions » Unbilled Receivables » Assign Unbilled Reason Codes
Create Unbilled Analysis Report Tables	Projects » Billing » Unbilled Receivables » Create Unbilled Analysis Report	Projects » Process » Unbilled Receivables » Update Unbilled Analysis Report Tables
Edit Unbilled Reason Codes	Projects » Billing » Unbilled Receivables » Edit Unbilled Reason Codes	Projects » Transactions » Unbilled Receivables » Assign Unbilled Reason Codes
Print Unbilled Analysis Report	Projects » Billing » Unbilled Receivables » Print Unbilled Analysis	Projects » Review » Unbilled Receivables » Unbilled Analysis Report

EDI Billing Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » EDI Billing Processing	Client/Server	Web
Create EDI Files	Projects » Billing » EDI Billing » Create EDI Files	Projects » Process » Billing » Create Billing EDI Files

Billing History

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Billing History	Client/Server	Web
Manage Billing History	Projects » Billing » Billing History » Maintain Billing History	Not in Costpoint Web
Manage Closed Billing Detail	Projects » Billing » Billing History » Maintain Closed Billing Detail	Projects » Configure » Billing History » Posted Billing Detail
Manage Project Bill Summary	Projects » Billing » Billing History » Maintain Project Bill Summary	Not in Costpoint Web
Manage Closed Progress Billing Detail	Projects » Billing » Billing History » Maintain Closed Progress Billing Detail	Not in Costpoint Web
Manage Subcontractor Progress Payments	Projects » Billing » Billing History » Maintain Subcontractor Progress Payments	Projects » Configure » Billing History » Subcontractor Progress Payments

Billing Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Billing Reports/Inquiries	Client/Server	Web
Print Billing Register	Projects » Billing » Inquiry and Reporting » Print Billing Register	Projects » Review » Billing » Billing Register Report
Print Open Billing Detail Report	Projects » Billing » Inquiry and Reporting » Print Open Billing Detail	Projects » Review » Billing » Open Billing Detail Report
View Standard Billing History	Projects » Billing » Inquiry and Reporting » Standard Billing History Inquiry	Not in Costpoint Web

Open Billing Detail Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Open Billing Detail Utilities	Client/Server	Web
Update Open Billing Detail Records	Projects » Billing » Utilities » Update Open Billing Detail	Projects » Utilities » Project Toolkits » Update Open Billing Detail
Purge Open Billing Detail Records	Projects » Billing » Utilities » Purge Open Billing Detail	Not in Costpoint Web

Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Billing Controls	Client/Server	Web
Configure Billing Settings	Projects » Billing » Controls » Billing Settings	Not in Costpoint Web

Projects

Manage Billing Accounts	Projects » Billing » Controls » Maintain Billing Accounts	Not in Costpoint Web
Manage Billing Cycles	Projects » Billing » Controls » Billing Cycle	Projects » Configure » Billing » Billing Cycles
Manage Billing Standard Text	Projects » Billing » Controls » Billing Standard Text	Not in Costpoint Web
Manage Billing User Groups	Projects » Billing » Controls » Billing User Groups	Projects » Configure » Billing » Billing User Groups
Manage Contractor Addresses	Projects » Billing » Controls » Contractor Addresses	Not in Costpoint Web
Manage Government Payment Offices	Projects » Billing » Controls » Govt. Payment Offices	Not in Costpoint Web
Manage Other Charges	Projects » Billing » Controls » Maintain Other Charges	Projects » Configure » Billing » Other Billing Charges
Manage Remittance Addresses	Projects » Billing » Controls » Remittance Addresses	Projects » Configure » Billing » Remittance Addresses
Manage Taxable Sales Accounts	Projects » Billing » Controls » Taxable Sales Account	Not in Costpoint Web
Configure WAWF Billing Settings	Projects » Billing » Controls » Maintain WAWF Billing Settings	Administration » Configure » Projects » WAWF Billing Settings
Configure Billing EDI Settings	Projects » Billing » EDI Billing » Maintain Billing EDI Settings	Administration » Configure » Projects » Billing EDI Settings
Manage Project EDI Information	Projects » Billing » EDI Billing » Maintain Project EDI Information	Not in Costpoint Web

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Billing » Administrative Utilities	Client/Server	Web
Update Billing Currency Amounts	Projects » Billing » Utilities » Miscellaneous Toolkits » Update Billing Currency Amounts*	Not in Costpoint Web
Update Billing Tables for Cumulative Tax	Projects » Billing » Utilities » Miscellaneous Toolkits » Update Billing Tables for Cumulative Tax*	Not in Costpoint Web
Update Billing Tables Bill Labor Category Description	Projects » Billing » Utilities » Miscellaneous Toolkits » Update Billing Tables BillLabCatDescr*	Not in Costpoint Web
Validate Open Billing Detail Account Function Codes	Projects » Billing » Utilities » Miscellaneous Toolkits » Open Billing Detail Account Function Code Toolkit*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

NASA 533s

NASA 533 Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » NASA 533s » NASA 533 Processing	Client/Server	Web
Manage NASA 533 Formats	Projects » NASA 533s » Formats	Not in Costpoint Web
Manage NASA 533 Project Information	Projects » NASA 533s » Project Info	Not in Costpoint Web

Projects

Create NASA 533 Report Tables	Projects » NASA 533s » Create NASA 533s	Not in Costpoint Web
Print NASA 533 Report	Projects » NASA 533s » Print NASA 533s	Not in Costpoint Web

NASA 533 Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » NASA 533s » NASA 533 Controls	Client/Server	Web
Configure NASA 533 Fiscal Years	Projects » NASA 533s » Map Fiscal Years for Reporting	Not in Costpoint Web
Configure NASA 533 Accounting Periods	Projects » NASA 533s » Map Accounting Periods for Reporting	Not in Costpoint Web

Inter-Company Work Orders

Inter-Company Work Orders Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Inter-Company Work Orders » Inter-Company Work Orders Processing	Client/Server	Web
Manage IWO Expense Mappings	Projects » Inter-Company Work Orders » Controls » IWO Expense Mapping	Not in Costpoint Web
Manage IWO Projects	Projects » Inter-Company Work Orders » Controls » IWO Project Setup	Not in Costpoint Web
Create IWO Allocations	Projects » Inter-Company Work Orders » Create IWO Allocations	Not in Costpoint Web

Projects

Manage IWO Allocations	Projects » Inter-Company Work Orders » Controls » Maintain IWO Allocations	Not in Costpoint Web
Post IWO Journal	Projects » Inter-Company Work Orders » Post IWO Journal	Not in Costpoint Web

Inter-Company Work Orders Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Inter-Company Work Orders » Inter-Company Work Orders Interfaces	Client/Server	Web
Export IWO Allocations	Projects » Inter-Company Work Orders » Export IWO Allocations	Not in Costpoint Web
Import IWO Allocations	Projects » Inter-Company Work Orders » Import IWO Allocations	Not in Costpoint Web
Validate IWO Allocations	Projects » Inter-Company Work Orders » IWO Allocation Preprocessor	Not in Costpoint Web
Validate IWO Suspense Transactions	Projects » Inter-Company Work Orders » Maintain IWO Suspense	Not in Costpoint Web

Inter-Company Work Orders Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Projects » Inter-Company Work Orders » Inter-Company Work Orders Controls	Client/Server	Web
Configure Transfer Locations	Projects » Inter-Company Work Orders » Controls » Maintain Transfer Locations	Not in Costpoint Web

People

Employee

Basic Employee Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Basic Employee Information	Client/Server	Web
Manage Employee Information	People » Employee » Basic Employee Setup » Maintain Employee Master People » Employee » Basic Employee Setup » Basic Employee Info	People » Maintain » Employee » Employee User Flow
Manage Employee Salary Information	People » Employee » Basic Employee Setup » Salary Info and History	People » Maintain » Employee » Employee Salary Information
Update Salaries for Compensation Plan Changes	People » Employee » Mass Updates » Update Employees for Compensation Plan Changes	Not in Costpoint Web
Update Employees for Manager Change	People » Employee » Mass Updates » Update Employees for Manager Change	Not in Costpoint Web
Update Employee Affirmative Action Plan	People » Employee » Mass Updates » Update Employee Affirmative Action Plan	Not in Costpoint Web
Manage Employee Allowances	People » Employee » Basic Employee Setup » Maintain Employee Allowances	People » Maintain » Employee » Employee Allowances
Manage Employee User-Defined Information	People » Employee » Basic Employee Setup » Employee User-Defined Info	People » Maintain » Employee » Employee User-Defined Information

Manage Employee Life Events	People » Employee » Basic Employee Setup » Employee Life Events	Not in Costpoint Web
Assign GLCs to Employees	People » Employee » Basic Employee Setup » Authorized Labor Categories	People » Maintain » Employee » Assign GLCs to Employees
Manage Employee Photo File Locations	People » Employee » Employee HR Setup » Employee Photo	Not in Costpoint Web
Manage Employee U.S. and ITAR Data	Not in Costpoint Client/Server	Not in Costpoint Web

Employee Leave Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Leave Information	Client/Server	Web
Manage Leave Beginning Balances	People » Employee » Basic Employee Setup » Maintain Leave Beginning Balances	People » Maintain » Employee » Employee Leave Beginning Balances
Manage Employee Leave	People » Employee » Basic Employee Setup » Employee Leave	People » Maintain » Employee » Employee Leave

Employee Payroll Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Payroll Information	Client/Server	Web
Manage Employee Taxes	People » Employee » Employee Payroll Setup » Employee Taxes	Not in Costpoint Web
Manage Employee Deductions	People » Employee » Employee Payroll Setup » Employee Deductions	Not in Costpoint Web

Manage Employee Contributions	People » Employee » Employee Payroll Setup » Employee Contributions	Not in Costpoint Web
Update Employee Deductions/Contributions	People » Employee » Mass Update » Update Employee Deduction/Contributions	Not in Costpoint Web
Manage Employee Bank Information	People » Employee » Employee Payroll Setup » Maintain Employee Bank Info	Not in Costpoint Web
Manage Employee Savings Bonds	People » Employee » Employee Payroll Setup » Employee Bond Table	Not in Costpoint Web
Manage Employee Garnishments	People » Employee » Employee Payroll Setup » Employee Garnishments	Not in Costpoint Web

Employee Benefit Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Benefit Information	Client/Server	Web
Manage Employee Benefit Elections	People » Employee » Employee Benefit Setup » Employee Benefit Elections	Not in Costpoint Web
Manage Employee Dependents/Beneficiaries	People » Employee » Employee Benefit Setup » Employee Dependents/Beneficiaries	Not in Costpoint Web
Assign Dependents to Benefit Plans	People » Employee » Employee Benefit Setup » Assign Dependents to Benefit Plans	Not in Costpoint Web
Assign Beneficiaries to Benefit Plans	People » Employee » Employee Benefit Setup » Assign Beneficiaries to Benefit Plans	Not in Costpoint Web

Employee FSA Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee FSA Information	Client/Server	Web
Manage Employee Dependent Care FSA Elections	People » Employee » Employee FSA Setup » Employee Dependent Care FSA Elections	Not in Costpoint Web
Manage Dependent Care Reimbursement	People » Employee » Employee FSA Setup » Request Dependent Care Reimbursement	Not in Costpoint Web
Manage Dependent Care FSA History	People » Employee » Employee FSA Setup » Maintain Dependent Care History	Not in Costpoint Web
Manage Employee Medical Care FSA Elections	People » Employee » Employee FSA Setup » Employee Medical Care FSA Elections	Not in Costpoint Web
Manage Medical Care Reimbursement	People » Employee » Employee FSA Setup » Request Medical Care Reimbursement	Not in Costpoint Web
Manage Medical Care FSA History	People » Employee » Employee FSA Setup » Maintain Medical Care History	Not in Costpoint Web

Employee HR Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee HR Information	Client/Server	Web
Manage Employee I-9 Data	People » Employee » Employee HR Setup » I-9 Data	Not in Costpoint Web
Manage Employee Drug Testing Results	People » Employee » Employee HR Setup » Employee Drug Testing Results	Not in Costpoint Web

People

Manage Employee Medical Surveillance Log	People » Employee » Employee HR Setup » Employee Medical Surveillance	Not in Costpoint Web
Manage Education, Skills & Training Data	People » Employee » Employee HR Setup » Education, Skills & Training Data	Not in Costpoint Web
Update Employee Training	People » Employee » Mass Updates » Update Employee Training	Not in Costpoint Web
Manage Employee Awards	People » Employee » Employee HR Setup » Maintain Employee Awards	Not in Costpoint Web
Update Employee Service Awards	People » Employee » Mass Updates » Update Employee Service Awards	Not in Costpoint Web
Manage Employee Security Status	People » Employee » Employee HR Setup » Security Status by Employee	Not in Costpoint Web
Manage Company Issued Documents	People » Employee » Employee HR Setup » Company Issued Documents by Employee	Not in Costpoint Web
Manage Company Issued Property	People » Employee » Employee HR Setup » Company Property Issued to Employee	Not in Costpoint Web
Manage Company Issued Vehicles	People » Employee » Employee HR Setup » Company Vehicles by Employee	Not in Costpoint Web
Manage Employee State Driver's License	People » Employee » Employee HR Setup » State Driver's License by Employee	Not in Costpoint Web

Employee Deferred Compensation Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Deferred Compensation Information	Client/Server	Web
Manage Employee Deferred Compensation	People » Employee » Employee Deferred Comp Setup » Employee Deferred Compensation Info	Not in Costpoint Web
Update Employee Deferred Compensation Info	People » Employee » Mass Updates » Auto Load Employee Deferred Compensation Info	Not in Costpoint Web

Performance Review Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Performance Review Processing	Client/Server	Web
Print Review Form Template	People » Employee » Employee Performance Reviews » Print Review Form Template	Not in Costpoint Web
Manage Employee Review	People » Employee » Employee Performance Reviews » Maintain Employee Review Info	Not in Costpoint Web
Print Completed Review Forms	People » Employee » Employee Performance Reviews » Print Completed Review Form	Not in Costpoint Web
Update Employee Salary Based on Review	People » Employee » Employee Performance Reviews » Update Employee Salary Based On Review	Not in Costpoint Web
Print Performance Review Statistics	People » Employee » Employee Performance Reviews » Print Review Statistics by Employee	Not in Costpoint Web

Termination Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Termination Processing	Client/Server	Web
Print Exit Interview Form Template	People » Employee » Termination Processing » Print Exit Interview Form Template	Not in Costpoint Web
Manage Employee Exit Interviews	People » Employee » Termination Processing » Maintain Employee Exit Interview Info	Not in Costpoint Web
Print Completed Exit Interview Form	People » Employee » Termination Processing » Print Completed Exit Interview Form	Not in Costpoint Web

Employee Reports

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Reports	Client/Server	Web
Print Employee Awards List	People » Employee » Employee Reports » Print Employee Awards	Not in Costpoint Web
Print Employee Basic Report	People » Employee » Employee Reports » Print Employee Basic Report	People » Review » Employee » Basic Employee Information Report
Print Employee Job Title Report	People » Employee » Employee Reports » Print Employees by Job Title	Not in Costpoint Web
Print Employee Medical Surveillance Data Report	People » Employee » Employee Reports » Print Employee Medical Surveillance Data	Not in Costpoint Web
Print Employee Salary Information Report	People » Employee » Employee Reports » Print Employee Salary Info and History Rpt	People » Review » Employee » Employee Salary Information Report

Print Employee Setup Report	People » Employee » Employee Reports » Print Employee Setup Report	People » Review » Employee » Employee Setup Report
Print FLSA Status Report	People » Employee » Employee Reports » FLSA Status Report	Not in Costpoint Web
Print New Hire Report	People » Employee » Employee Reports » Print New Hire Report	Not in Costpoint Web

Employee Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Utilities	Client/Server	Web
Change Employee Address Line Order	People » Labor » Utilities » Miscellaneous Functions » Reorder Employee Address Line Information*	Not in Costpoint Web
Convert Race/Ethnicity Codes to New Race Codes	People » Labor » Utilities » Miscellaneous Functions » Convert Race/Ethnicity Codes*	Not in Costpoint Web
Update Employee Telephone Types	People » Labor » Utilities » Miscellaneous Functions » Update Employee Telephone Types*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Functions screen have been broken out into standalone applications in Costpoint 7.

Employee Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Interfaces	Client/Server	Web
Manage Employee Import User-Defined Format	Others » Product Interfaces » Preprocessors » Employee Basic Preprocessor Setup	Not in Costpoint Web

Import Employee Data	Others » Product Interfaces » Preprocessors » Employee Basic Preprocessor	Not in Costpoint Web
Import Employee Leave and Deductions	Others » Product Interfaces » Preprocessors » Deduction and Leave Preprocessor	Not in Costpoint Web
Transfer Silkroad Data	Not in Costpoint Client/Server	Not in Costpoint Web
Configure ESS Global Settings	Others » Product Interfaces » Employee Self Service » ESS Global Settings	Not in Costpoint Web
Manage ESS Company Settings	Others » Product Interfaces » Employee Self Service » ESS Company Settings	Not in Costpoint Web
Manage ESS Company Links	Others » Product Interfaces » Employee Self Service » ESS Company Links	Not in Costpoint Web
Configure ESS Life Events	Others » Product Interfaces » Employee Self Service » ESS Life Event Setup	Not in Costpoint Web
Configure ESS State Tax Settings	Others » Product Interfaces » Employee Self Service » ESS State Tax Settings	Not in Costpoint Web
Approve Employee Life Events	Others » Product Interfaces » Employee Self Service » Approve Employee Life Events	Not in Costpoint Web
Manage Life Event User Flow Status	Others » Product Interfaces » Employee Self Service » Life Event User Flow Status	Not in Costpoint Web
Manage ESS Life Event Benefit Elections	Others » Product Interfaces » Employee Self Service » ESS Life Event Benefit Elections	Not in Costpoint Web
Update Benefit Option/Election Tables	Others » Product Interfaces » Employee Self Service » Populate Open Enrollment Benefit Options	Not in Costpoint Web

Manage ESS Open Enrollment Elections	Others » Product Interfaces » Employee Self Service » ESS Open Enrollment Elections	Not in Costpoint Web
Approve ESS Benefit Elections By Plan	Others » Product Interfaces » Employee Self Service » Approve ESS Benefit Elections by Plan	Not in Costpoint Web
Activate Pending ESS Benefit Elections	Others » Product Interfaces » Employee Self Service » Activate Pending Benefit Elections	Not in Costpoint Web
Manage ESS Retirement Benefit Elections	Others » Product Interfaces » Employee Self Service » Maintain ESS Retirement Benefit Elections	Not in Costpoint Web
Activate ESS Retirement Benefit Changes	Others » Product Interfaces » Employee Self Service » Maintain ESS Retirement Benefit Elections	Not in Costpoint Web
Purge ESS Data	Others » Product Interfaces » Employee Self Service » Purge ESS Data	Not in Costpoint Web

Employee Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Employee » Employee Controls	Client/Server	Web
Manage Employee Class Codes	People » Employee » Employee Controls » Employee Class	People » Configure » Employee » Employee Class Codes
Manage Employee User-Defined Labels	People » Employee » Employee Controls » Employee User-Defined Labels	Not in Costpoint Web
Manage Life Event Codes	People » Employee » Employee Controls » Life Event Codes	Not in Costpoint Web
Manage Locator Codes	Not in Costpoint Client/Server	Not in Costpoint Web

People

Manage Race and Ethnicity Codes	People » Employee » Employee Controls » Race/Ethnicity Codes	Not in Costpoint Web
Manage Visa Types	People » Employee » Employee Controls » Visa Types	Not in Costpoint Web
Manage Citizen Status Codes	Not in Costpoint Client/Server	Not in Costpoint Web

Labor

Timesheet Defaults

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Timesheet Defaults	Client/Server	Web
Manage Timesheet Line Type Defaults	People » Labor » Timesheet Default Setup » Timesheet Line Type Default Settings	People » Maintain » Timesheet Defaults » Timesheet Line Type Defaults
Manage Employee Timesheet Line Type Defaults	People » Labor » Timesheet Default Setup » Employee Timesheet Line Type Defaults	People » Maintain » Timesheet Defaults » Employee Timesheet Line Type Defaults
Manage Employee Project Timesheet Defaults	People » Labor » Timesheet Default Setup » Employee Project TS Defaults	Not in Costpoint Web
Manage Employee Proj-Acct-Group Timesheet Defaults	People » Labor » Timesheet Default Setup » Employee Project-Acct-Grp TS Defaults	People » Maintain » Timesheet Defaults » Employee Project/Account Group Timesheet Defaults
Manage Labor-Group Proj-Acct-Group Timesheet Defaults	People » Labor » Timesheet Default Setup » Labor-Grp Project-Acct-Grp TS Defaults	Not in Costpoint Web
Manage Project Timesheet Defaults	People » Labor » Timesheet Default Setup » Project TS Defaults	People » Maintain » Timesheet Defaults » Project Timesheet Defaults

Timesheet Entry/Creation

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Timesheet Entry/Creation	Client/Server	Web
Manage Timesheet Periods	People » Labor » Labor Controls » Timesheet Periods	Not in Costpoint Web
Manage Work Schedules	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Timesheet Batches	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Timesheets	People » Labor » Timesheets » Enter Timesheets	People » Transactions » Timesheets » Enter Timesheets
Manage Correcting Timesheets	People » Labor » Timesheets » Enter Correcting Timesheets	People » Transactions » Timesheets » Enter Correcting Timesheets
Create Auto-Pay Timesheets	People » Labor » Auto Generation of Timesheets » Create Auto-Pay Timesheets	Not in Costpoint Web
Create Retroactive Timesheet Adjustments	People » Labor » Auto Generation of Timesheets » Create Retroactive Timesheet Adjustments	People » Process » Timesheets » Create Retroactive Pay Timesheets
Create Reversing Timesheets	People » Labor » Auto Generation of Timesheets » Create Reversing Timesheets	People » Process » Timesheets » Create Reversing Timesheets
Create Leave Payout Timesheets	People » Labor » Auto Generation of Timesheets » Create Leave Payout Timesheets	People » Process » Timesheets » Create Leave Payout Timesheets
Delete Retroactive Timesheet Adjustments	People » Labor » Auto Generation of Timesheets » Delete Retroactive Timesheet Adjustments	People » Utilities » Timesheet » Delete Retroactive Timesheet Adjustments
Delete Leave Payout Timesheets	People » Labor » Auto Generation of Timesheets » Delete Leave Payout Timesheets	Not in Costpoint Web

Timesheet Adjustments

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Timesheet Adjustments	Client/Server	Web
Auto-Adjust Timesheets	People » Labor » Auto Generation of Timesheets » Auto-Adjust Timesheets in Batch Mode	Not in Costpoint Web
Apply Weighted Average Rates to Timesheets	People » Labor » Overtime Processing of Timesheets » Apply Weighted Average Rates	Not in Costpoint Web
Recast Overtime Premium to Timesheet Lines	People » Labor » Overtime Processing of Timesheets » Recast Overtime Premium	People » Process » Timesheets » Recast Overtime Premium
Allocate Compensated Overtime Across Timesheet Lines	People » Labor » Overtime Processing of Timesheets » Alloc Comp OT Across TS Lines	Not in Costpoint Web
Create Employee Allowance Timesheet Lines	People » Labor » Auto Generation of Timesheets » Create Employee Allowance TS Lines	Not in Costpoint Web
Delete Recasted Overtime Premium from Timesheet Lines	People » Labor » Overtime Processing of Timesheets » Delete Recasted Overtime Premium	People » Utilities » Timesheet » Delete Recasted Overtime Premium
Delete Allocated Compensation OT from Timesheet Lines	People » Labor » Overtime Processing of Timesheets » Delete Allocated Comp OT	People » Utilities » Timesheet » Delete Allocated Compensated Overtime
Delete Employee Allowance Timesheet Lines	People » Labor » Auto Generation of Timesheets » Delete Employee Allowance TS Lines	People » Utilities » Timesheet » Delete Employee Allowance Timesheet Lines

Timesheet Reporting

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Timesheet Reporting	Client/Server	Web
Print Missing Timesheet Report	People » Labor » Timesheets » Print Missing Timesheet Rpt	People » Transactions » Timesheets » Print Missing Timesheet List
Print Timesheet Information Report by Employee	People » Labor » Timesheets » Print TS Edit by Empl Rpt	People » Transactions » Timesheets » Print Timesheet Information by Employee
Print Timesheet Information Report by Account	People » Labor » Timesheets » Print TS Edit by Acct Rpt	People » Transactions » Timesheets » Print Timesheet Information by Account

Timesheet Posting

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Timesheet Posting	Client/Server	Web
Post Timesheets	People » Labor » Timesheets » Post Labor Distribution	People » Process » Post » Post Labor

Labor Reports and Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Labor Reports and Inquiries	Client/Server	Web
Print Employee Labor Summary Report	People » Labor » Labor Reports » Print Employee Labor Summary Rpt	People » Review » Labor » Employee Labor Summary Report
Print Labor Utilization Report	People » Labor » Labor Reports » Print Labor Utilization Report	People » Review » Labor » Labor Utilization Report

Print Timesheet History Report	People » Labor » Timesheets » Print Timesheet History Rpt	Not in Costpoint Web
View Employee Labor Inquiry	People » Labor » Inquiries » Employee Labor Inquiry	People » Review » Labor » Employee Labor Inquiry
View Timesheet History Inquiry	People » Labor » Inquiries » Timesheet History Inquiry	People » Review » Labor » Timesheet History Inquiry

Timesheet Interface

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Timesheet Interface	Client/Server	Web
Manage Deltek Time and Expense Account Types	People » Labor » Deltek T&E / Project Manufacturing » Time Collection Account Types	Not in Costpoint Web
Manage Accounts for Export	People » Labor » Deltek T&E / Project Manufacturing » Manage Accounts for Export	Not in Costpoint Web
Manage Projects for Export	People » Labor » Deltek T&E / Project Manufacturing » Manage Projects for Export	Not in Costpoint Web
Manage Deltek Time and Expense Org	People » Labor » Deltek T&E / Project Manufacturing » Manage Organizations for Export	Not in Costpoint Web
Export Data To Deltek Time and Expense	People » Labor » Deltek T&E / Project Manufacturing » Export Data to Deltek Time & Expense 5.X	Not in Costpoint Web
Export Used Leave to Deltek Time and Expense	People » Labor » Utilities » Miscellaneous Functions » Export Used Leave to Deltek Time & Expense*	Not in Costpoint Web

Import Work Schedules from Deltek Time and Expense	Not in Costpoint Client/Server	Not in Costpoint Web
Import Timesheets from Deltek Time and Expense	People » Labor » Deltek T&E / Project Manufacturing » Upload from Time Collection (ET)	Not in Costpoint Web
Configure Timesheet Suspense Values	Others » Product Interfaces » Preprocessors » Timesheet Suspense Setup	Not in Costpoint Web
Import Timesheets	Others » Product Interfaces » Preprocessors » Timesheet Preprocessor	Not in Costpoint Web
Export Project Manufacturing Data	Not in Costpoint Client/Server	People » Utilities » Interfaces » Export Project Manufacturing Data
Project Manufacturing Export Status History	Not in Costpoint Client/Server	People » Utilities » Interfaces » Project Manufacturing Export Status History

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.1.

ADP Interface

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » ADP Interface	Client/Server	Web
Manage ADP Mapping Values	Others » Product Interfaces » ADP Interface » ADP Mappings	Not in Costpoint Web
Manage ADP 2.5 Mapping Values	Others » Product Interfaces » ADP Interface » ADP 2.5 Mappings	Not in Costpoint Web
Export Timesheets to ADP	Others » Product Interfaces » ADP Interface » ADP Timesheet Transfer	Not in Costpoint Web

Ceridian Interface

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Ceridian Interface	Client/Server	Web
Manage Ceridian Configuration	Others » Product Interfaces » Ceridian Interface » Maintain Ceridian Configuration	Not in Costpoint Web
Export Timesheet to Ceridian	Others » Product Interfaces » Ceridian Interface » Download Timesheets to Ceridian	Not in Costpoint Web

Labor Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Labor Controls	Client/Server	Web
Configure Labor Settings	People » Labor » Labor Controls » Labor Settings	Not in Costpoint Web
Manage General Labor Categories	People » Labor » Labor Controls » General Labor Categories	People » Configure » Labor » General Labor Categories
Manage Workers' Compensation Codes	People » Labor » Labor Controls » Workers' Comp Codes	People » Configure » Work-Related Injuries-Illnesses » Workers' Compensation Codes

Labor Rate Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Labor Rate Controls	Client/Server	Web
Manage Pay Types	People » Labor » Labor Controls » Pay Types	People » Configure » Labor » Pay Types

Manage Pay Type Restrictions	People » Labor » Labor Rate Controls » Pay Type Restrictions	People » Configure » Labor » Pay Type Restrictions
Manage Labor Groups/Unions	People » Labor » Labor Rate Controls » Labor Groups/Unions	People » Configure » Labor » Labor Groups/Unions
Manage Labor Locations/Locals	People » Labor » Labor Rate Controls » Labor Locations/Locals	People » Configure » Labor » Labor Locations/Locals
Manage Wage Determination Rates	People » Labor » Labor Rate Controls » Wage Determination Rates	People » Configure » Labor » Wage Determination Rates
Manage Wage Determination Fringe Charge Codes	People » Labor » Labor Rate Controls » WD Fringe Handling	Not in Costpoint Web
Manage Allowance Codes	People » Labor » Labor Rate Controls » Allowances	People » Configure » Payroll » Allowances
Manage Allowance Account Mapping	People » Labor » Labor Rate Controls » Map Allowance Accounts	People » Configure » Payroll » Allowance Account Mappings

Overtime Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Overtime Controls	Client/Server	Web
Manage Overtime Premium Recast Charge Codes	People » Labor » Overtime Controls » Overtime Premium Recast	People » Configure » Overtime » Overtime Premium Recast
Configure Weighted Average Overtime Settings	People » Labor » Overtime Controls » Weighted Average Overtime Setup	Not in Costpoint Web
Manage Overtime Rules by Location	People » Labor » Overtime Controls » Overtime Rules by Location	People » Configure » Overtime » Overtime Rules by Location

Manage Overtime Rules by State	People » Labor » Overtime Controls » Overtime Rules by State	People » Configure » Overtime » Overtime Rules by State
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Union Information Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Union Information Controls	Client/Server	Web
Manage Fringe Codes	People » Labor » Union Info » Fringe Code Setup	People » Configure » Labor » Union Fringe Codes
Manage Fringe Modify Codes	People » Labor » Union Info » Fringe Modify Code	People » Configure » Labor » Union Fringe Modify Codes
Manage Assignment of Employees to Crews	People » Labor » Union Info » Crew Assignment	Not in Costpoint Web
Manage Union Profile Setup	People » Labor » Union Info » Union Profile	Not in Costpoint Web
Update Fringe Table in Union Profile	People » Labor » Union Info » Mass Update of Fringes	Not in Costpoint Web
Manage Fringe Ceilings by Local	People » Labor » Union Info » Union Fringe Ceilings by Local	Not in Costpoint Web

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Labor » Administrative Utilities	Client/Server	Web
Purge Labor History Tables	People » Labor » Utilities » Miscellaneous Functions » Purge Labor History Table*	Not in Costpoint Web

Purge Timesheet History	People » Labor » Utilities » Purge Timesheet History	Not in Costpoint Web
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* The functions formerly available in the Miscellaneous Functions screen have been broken out into standalone applications in Costpoint 7.

Leave

Leave Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Leave » Leave Processing	Client/Server	Web
Manage Leave Periods	People » Leave » Leave Controls » Leave Periods	People » Configure » Leave » Leave Periods
Print Employee Leave Report	People » Leave » Leave Processing » Print Employee Leave Report	People » Transactions » Leave » Print Employee Leave List
Compute Leave Accruals	People » Leave » Leave Processing » Compute Leave Accruals	People » Transactions » Leave » Compute Leave Accruals
Print Leave Edit Report	People » Leave » Leave Processing » Print Leave Edit Report	People » Transactions » Leave » Print Leave Edit Accruals
Manage Leave Edit Table	People » Leave » Leave Processing » Maintain Leave Edit Table	People » Transactions » Leave » Edit Employee Leave Accruals
Print Employee Leave Statements	People » Leave » Leave Processing » Print Employee Leave Statements	People » Transactions » Leave » Print Employee Leave Statements
Post Leave Accruals	People » Leave » Leave Processing » Post Leave Accruals	People » Process » Post » Post Leave
Print Leave Accrual Report	People » Leave » Leave Processing » Print Accrued Leave Report	People » Transactions » Leave » Print Accrued Leave Balances

Close Leave Period	People » Leave » Leave Processing » Close Leave Period	People » Process » Close » Close Leave Period
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Year-End Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Leave » Year-End Processing	Client/Server	Web
Close Leave Year	People » Leave » Leave Processing » Close Leave Year	People » Transactions » Calendar-Year End » Close Leave Year

Leave Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Leave » Leave Inquiries	Client/Server	Web
View Leave History	People » Leave » Inquiries » Leave History Inquiry	People » Review » Leave » Leave History Inquiry

Leave Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Leave » Leave Utilities	Client/Server	Web
Trade-Up Leave History Table to Last Reconciliation	Not in Costpoint Client/Server	Not in Costpoint Web
Reconcile Leave Balances	Not in Costpoint Client/Server	Not in Costpoint Web
Purge Leave History	People » Leave » Utilities » Purge Leave History	People » Utilities » Purge » Purge Leave History

Leave Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Leave » Leave Controls	Client/Server	Web
Configure Leave Settings	People » Leave » Leave Controls » Leave Settings	Administration » Configure » People » Leave Settings
Manage Leave Types	People » Leave » Leave Controls » Leave Types	People » Configure » Leave » Leave Types
Manage Leave Codes	People » Leave » Leave Controls » Leave Tables	People » Configure » Leave » Leave Codes
Manage Leave Modify Codes	People » Leave » Leave Controls » Leave Modifier Codes	Not in Costpoint Web

Payroll

Payroll Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Payroll Processing	Client/Server	Web
Manage Pay Periods	People » Payroll » Payroll Controls » Pay Periods	Not in Costpoint Web
Update Excess Life Deductions	People » Payroll » Payroll Processing » Set Excess Life Deductions	Not in Costpoint Web
Update Employee Package Deductions	People » Payroll » Payroll Processing » Mass Update Employee Package Deductions	Not in Costpoint Web

People

Compute Payroll	People » Payroll » Payroll Processing » Compute Payroll	Not in Costpoint Web
Print Payroll Edit Report	People » Payroll » Payroll Processing » Print Payroll Edit Report	Not in Costpoint Web
Manage Payroll Records	People » Payroll » Payroll Processing » Maintain Payroll Edit Table	Not in Costpoint Web
Activate Pending Employee Bank Information	People » Payroll » Direct Deposit Processing » Activate Pending Employee Bank Info	Not in Costpoint Web
Create ACH Bank File	People » Payroll » Direct Deposit Processing » Create Direct Deposit File	Not in Costpoint Web
Print Bank ACH File Report	People » Payroll » Direct Deposit Processing » Print Direct Deposit Edit Rpt	Not in Costpoint Web
Print Employee Bank Information Report	People » Payroll » Direct Deposit Processing » Print Employee Bank Info Rpt	Not in Costpoint Web
Print Payment Advices	People » Payroll » Direct Deposit Processing » Print/Reprint Payment Advices	Not in Costpoint Web
Print Paychecks	People » Payroll » Payroll Processing » Print/Reprint Paychecks	Not in Costpoint Web
Close Pay Period	People » Payroll » Payroll Closing » Close Pay Period	Not in Costpoint Web

Payroll Closing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Payroll Closing	Client/Server	Web

Post Payroll Journal	People » Payroll » Payroll Closing » Post Payroll Journal	Not in Costpoint Web
Print Certified Payroll Report	People » Payroll » Employee Payroll History and Reporting » Print Certified Payroll Rpt	Not in Costpoint Web
Create Accounts Payable Vouchers	People » Payroll » Payroll Closing » Create A/P Vouchers	Not in Costpoint Web
Print Accounts Payable Voucher Status Report	People » Payroll » Payroll Closing » A/P Voucher Status Report	Not in Costpoint Web

Payroll History

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Payroll History	Client/Server	Web
Print Employee Earnings Report	People » Payroll » Employee Payroll History and Reporting » Print Employee Earnings Rpt	Not in Costpoint Web
Manage Employee Earnings History	People » Payroll » Employee Payroll History and Reporting » Maintain Employee Earnings	Not in Costpoint Web

U.S. Treasury Savings Bonds

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » U.S. Treasury Savings Bonds	Client/Server	Web
Manage Savings Bonds Treasury File Data	People » Payroll » U.S. Treasury Savings Bonds » Savings Bond Info by Taxable Entity	Not in Costpoint Web
Create U.S. Treasury File	People » Payroll » U.S. Treasury Savings Bonds » Create U.S. Treasury File	Not in Costpoint Web

View Savings Bond File History	People » Payroll » U.S. Treasury Savings Bonds » Savings Bond File History Inquiry	Not in Costpoint Web
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Tax Reporting

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Tax Reporting	Client/Server	Web
Create EFTPS Payroll Tax Deposit File	People » Payroll » Tax Reporting » Create EFTPS Payroll Tax Deposit File	Not in Costpoint Web
Print Soc Sec and Medicare Reconciliation Report	People » Payroll » Tax Reporting » Print Soc Sec and Med Reconciliation Rpt	Not in Costpoint Web
Print Quarterly Federal Payroll Tax Report	People » Payroll » Tax Reporting » Print Federal Qtrly PR Tax Rpt	Not in Costpoint Web
Create Monthly SUTA Tax File	Not in Costpoint Client/Server	Not in Costpoint Web
Create Quarterly EFTPS FUTA Tax File	People » Payroll » Tax Reporting » Create EFTPS FUTA Qtrly Tax Dep File	Not in Costpoint Web
Print State Withholding Report	People » Payroll » Tax Reporting » Print State Withholding Rpt	Not in Costpoint Web
Print Local Withholding Report	People » Payroll » Tax Reporting » Print Local Withholding Rpt	Not in Costpoint Web
Print Quarterly State Unemployment Report	People » Payroll » Tax Reporting » Print State Qtrly Unemployment Rpt	Not in Costpoint Web
Create Quarterly SUTA Tax File	People » Payroll » Tax Reporting » Create State Qtrly Unempl Mag Media	Not in Costpoint Web
Print Workers' Compensation Accrual Report	People » Payroll » Tax Reporting » Print Worker's Comp Accrual Rpt	Not in Costpoint Web

Year-End Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Year-End Processing	Client/Server	Web
Close Payroll Year	People » Payroll » Year-End Processing » Close Payroll Year	Not in Costpoint Web
Create W-2 Table	People » Payroll » Year-End Processing » Create W-2 Table	Not in Costpoint Web
Manage W-2s	People » Payroll » Year-End Processing » Edit W-2s	Not in Costpoint Web
Print W-2s	People » Payroll » Year-End Processing » Print W-2s	Not in Costpoint Web
Print W-2 Summary Report	People » Payroll » Year-End Processing » Print W-2 Summary Report	Not in Costpoint Web
Manage Tax File Data	People » Payroll » Year-End Processing » Maintain Mag Media Reporting	Not in Costpoint Web
Update Tax File Country Code	People » Payroll » Utilities » Update Mag Media Country Code	Not in Costpoint Web
Create Federal W-2 File	People » Payroll » Year-End Processing » Create Federal Mag Media	Not in Costpoint Web
Create State W-2 File	People » Payroll » Year-End Processing » Create State Mag Media	Not in Costpoint Web

Payroll Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Payroll Utilities	Client/Server	Web
Delete Payment Advices from Payroll Edit Table	People » Payroll » Utilities » Clear Payment Advice Info from Payroll Edit	Not in Costpoint Web
Delete Paychecks from Payroll Edit Table	People » Payroll » Utilities » Clear Paycheck Info from Payroll Edit	Not in Costpoint Web
Delete Timesheet Payroll Computed Flags	People » Payroll » Utilities » Clear Timesheet PR Computed Flags	Not in Costpoint Web
Recompute Taxable Wages	People » Payroll » Utilities » Recompute Taxable Wages	Not in Costpoint Web
Suspend/Restore Direct Deposits	People » Payroll » Direct Deposit Processing » Suspend/Restore Direct Deposit	Not in Costpoint Web
Update Dummy Check Numbers	People » Payroll » Utilities » Set Dummy PR Check Numbers	Not in Costpoint Web
Void/Replace Posted Paychecks	People » Payroll » Utilities » Void/Replace Posted Paychecks	Not in Costpoint Web

Payroll Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Payroll Interfaces	Client/Server	Web
Configure Payroll Tax Export Settings	Not in Costpoint Client/Server	Not in Costpoint Web
Export Payroll Taxes	Not in Costpoint Client/Server	Not in Costpoint Web

Payroll Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Payroll Reports/Inquiries	Client/Server	Web
Print Deduction Summary Report	People » Payroll » Employee Payroll History and Reporting » Print Deduction Summary Rpt	Not in Costpoint Web
Print Deduction/Benefit Report by Local	People » Payroll » Employee Payroll History and Reporting » Print Deduction/Benefit Rpt by Local	Not in Costpoint Web
Print Weekly Fringe Stamp Report	People » Payroll » Employee Payroll History and Reporting » Print Weekly Fringe Stamp Report	Not in Costpoint Web
View Bank Information	People » Payroll » Audit Inquiries » Employee Bank Info Inquiry	Not in Costpoint Web
View Basic Information	People » Payroll » Audit Inquiries » Basic Employee Info Inquiry	Not in Costpoint Web
View Bond Information	People » Payroll » Audit Inquiries » Employee Bond Info Inquiry	Not in Costpoint Web
View Contributions	People » Payroll » Audit Inquiries » Employee Contributions Inquiry	Not in Costpoint Web
View Deductions	People » Payroll » Audit Inquiries » Employee Deductions Inquiry	Not in Costpoint Web
View Employee Earnings	People » Payroll » Audit Inquiries » Employee Earnings Inquiry	Not in Costpoint Web
View Employee Taxes	People » Payroll » Audit Inquiries » Employee Taxes Inquiry	Not in Costpoint Web

People

View Garnishments	People » Payroll » Audit Inquiries » Employee Garnishments Inquiry	Not in Costpoint Web
View Payroll Edit Table	People » Payroll » Audit Inquiries » Payroll Edit Table Inquiry	Not in Costpoint Web
View Salary Information and History	People » Payroll » Audit Inquiries » Salary Info and History Inquiry	Not in Costpoint Web

Deductions

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Deductions	Client/Server	Web
Manage Deduction Modify Codes	People » Payroll » Payroll Controls » Setup Modify Codes	Not in Costpoint Web
Manage Deductions	People » Payroll » Payroll Controls » Deductions	Not in Costpoint Web
Manage Deduction Schedules	People » Payroll » Payroll Controls » Deduction Schedules	Not in Costpoint Web

Garnishments

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Garnishments	Client/Server	Web
Manage Garnishment Recipients	People » Payroll » Garnishment Control » Court Remittance Identification	Not in Costpoint Web
Manage Federal Tax Levy Exemptions	People » Payroll » Garnishment Control » Federal Tax Levy Exemptions	Not in Costpoint Web

People

Manage Minimum Wage	People » Payroll » Garnishment Control » State Minimum Wage	Not in Costpoint Web
Manage State Support Order Rules	Not in Costpoint Client/Server	Not in Costpoint Web

Federal Taxes

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Federal Taxes	Client/Server	Web
Manage Federal Taxes	People » Payroll » Payroll Tax Controls » Federal Taxes	Not in Costpoint Web
Manage Federal Tax Tables	People » Payroll » Payroll Tax Controls » Federal Tax Tables	Not in Costpoint Web
Manage Advance Earned Income Credit Tables	People » Payroll » Payroll Tax Controls » Advance EIC and Nonresident Alien Tables	Not in Costpoint Web

State Taxes

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » State Taxes	Client/Server	Web
Manage State Taxes	People » Payroll » Payroll Tax Controls » State Taxes	Not in Costpoint Web
Manage State Tax Override by Taxable Entity	People » Payroll » Payroll Tax Controls » State Tax Override by Taxable Entity	Not in Costpoint Web
Manage State Tax Allowances and Credits	People » Payroll » Payroll Tax Controls » State Tax Allowances and Credits	Not in Costpoint Web

Manage State Standard Deductions	People » Payroll » Payroll Tax Controls » State Standard Deductions	Not in Costpoint Web
Manage State Tax Tables	People » Payroll » Payroll Tax Controls » State Tax Tables	Not in Costpoint Web
Manage Reciprocal State Taxes	People » Payroll » Payroll Tax Controls » Reciprocal State Taxes	Not in Costpoint Web
Manage SUTA Tax File Data	People » Payroll » Payroll Tax Controls » State Mag Media Settings (SUTA)	Not in Costpoint Web
Manage SUTA Quarterly Reporting Data	People » Payroll » Payroll Tax Controls » SUTA Quarterly Reporting Data	Not in Costpoint Web
Manage SUTA "Weeks Worked" Override	People » Payroll » Payroll Tax Controls » State Mag Media Weeks Worked Exceptions	Not in Costpoint Web

Local Taxes

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Local Taxes	Client/Server	Web
Manage Local Taxes	People » Payroll » Payroll Tax Controls » Local Taxes	Not in Costpoint Web
Manage Local Tax Override by Taxable Entity	People » Payroll » Payroll Tax Controls » Local Tax Override by Taxable Entity	Not in Costpoint Web
Manage Local Standard Deductions	People » Payroll » Payroll Tax Controls » Local Standard Deductions	Not in Costpoint Web
Manage Local Tax Tables	People » Payroll » Payroll Tax Controls » Local Tax Tables	Not in Costpoint Web

Payroll Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Payroll Controls	Client/Server	Web
Configure Direct Deposit Settings	People » Payroll » Payroll Controls » Direct Deposit Setup	Not in Costpoint Web
Configure Paycheck Settings	People » Payroll » Payroll Controls » Pay Check Setup	Not in Costpoint Web
Configure Payroll Settings	People » Payroll » Payroll Controls » Payroll Settings	Not in Costpoint Web
Manage Pay Type Taxability	People » Payroll » Payroll Controls » Pay Type Taxability	Not in Costpoint Web
Manage Bank Routings	People » Payroll » Payroll Processing » Maintain Direct Deposit Banks	Not in Costpoint Web
Print Bank Routing Report	People » Payroll » Payroll Processing » Print Direct Deposit Banks Rpt	Not in Costpoint Web
Manage Workers' Compensation Modify Codes	People » Payroll » Payroll Controls » Worker's Comp Modify Codes	Not in Costpoint Web
Manage Workers' Compensation State Rates	People » Payroll » Payroll Controls » Worker's Comp State Rates	Not in Costpoint Web

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Payroll » Administrative Utilities	Client/Server	Web
Purge Audit File Data	People » Payroll » Audit Inquiries » Purge Audit File Data	Not in Costpoint Web

Compensation

Compensation Plans

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Compensation » Compensation Plans	Client/Server	Web
Manage Compensation Grades	People » Compensation » Compensation Controls » Grades	Not in Costpoint Web
Manage Compensation Plans	People » Compensation » Compensation Plan Setup » Compensation Plans	Not in Costpoint Web
Manage Compensation Plan Defaults	People » Compensation » Compensation Plan Setup » Compensation Plan Defaults	Not in Costpoint Web
Manage Compensation Plan Salary Ranges	People » Compensation » Compensation Plan Setup » Compensation Plan Salary Ranges	Not in Costpoint Web

Job Titles

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Compensation » Job Titles	Client/Server	Web
Manage Summary Job Titles	People » Compensation » Job Titles » Summary Job Titles	Not in Costpoint Web
Manage Functional Job Titles	People » Compensation » Job Titles » Functional Job Titles	Not in Costpoint Web
Manage Functional Position Descriptions	People » Compensation » Job Titles » Functional Position Descriptions	Not in Costpoint Web
Manage Detail Job Titles	People » Compensation » Job Titles » Detail Job Titles	Not in Costpoint Web
Manage Detail Position Descriptions	People » Compensation » Job Titles » Detail Position Descriptions	Not in Costpoint Web
Print Job Title Report	People » Compensation » Job Titles » Print Job Titles Report	Not in Costpoint Web
Print Job Title Position Description Report	People » Compensation » Job Titles » Print Position Descriptions	Not in Costpoint Web

Performance Reviews

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Compensation » Performance Reviews	Client/Server	Web
Manage Performance Ratings	People » Compensation » Performance Review Setup » Performance Ratings	Not in Costpoint Web

Manage Performance Ratings by Plan	People » Compensation » Compensation Plan Setup » Performance Rating Percent by Plan	Not in Costpoint Web
Manage Performance Ratings by Plan and Grade	People » Compensation » Compensation Plan Setup » Performance Rating Percent by Plan by Grade	Not in Costpoint Web
Print Review Rating Statistics Report by Manager	People » Compensation » Performance Review Setup » Print Review Statistics by Manager	Not in Costpoint Web
Manage Performance Review Forms	People » Compensation » Performance Review Setup » Review Form Setup	Not in Costpoint Web
Manage Performance Review Form Defaults	People » Compensation » Performance Review Setup » Review Form Employee Defaults	Not in Costpoint Web
Print Performance Review Schedule	People » Compensation » Performance Review Setup » Print Performance Review Schedule	Not in Costpoint Web
Print/Send Performance Review Schedule by Manager	People » Compensation » Performance Review Setup » Print/Send Performance Review Schedule	Not in Costpoint Web

Compensation Budgeting

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Compensation » Compensation Budgeting	Client/Server	Web
Manage Compensation Budgets By Organization	People » Compensation » Compensation Budgeting » Compensation Budget by Organization	Not in Costpoint Web
Manage Non-Budgeted Compensation Pay Types	People » Compensation » Compensation Budgeting » Non-Budgeted Compensation Pay Types	Not in Costpoint Web

Manage Projected Performance Ratings	People » Compensation » Compensation Budgeting » Projected Performance Rating Percent	Not in Costpoint Web
Print Budgeted/Actual Compensation Comparison Report	People » Compensation » Compensation Budgeting » Print Budgeted Vs. Actual Compensation Report	Not in Costpoint Web
Print Increase Pool Report	People » Compensation » Compensation Budgeting » Print Increase Pool Report	Not in Costpoint Web

Salary Surveys

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Compensation » Salary Surveys	Client/Server	Web
Manage Survey Companies	People » Compensation » Salary Survey » Basic Survey Company Info	Not in Costpoint Web
Manage Survey Job Title Mappings	People » Compensation » Salary Survey » Maintain Survey Job Titles to Func Job Titles	Not in Costpoint Web
Manage Survey Region Mappings	People » Compensation » Salary Survey » Maintain Survey Regions to Comp Plan Codes	Not in Costpoint Web
Import Salary Survey Data	People » Compensation » Salary Survey » Upload Salary Survey Data	Not in Costpoint Web
Manage Salary Survey Data	People » Compensation » Salary Survey » Maintain Salary Survey Data	Not in Costpoint Web
Print Compensation/Survey Comparison Report	People » Compensation » Salary Survey » Print Compensation to Survey Data Comparison	Not in Costpoint Web

Compensation Reports

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Compensation » Compensation Reports	Client/Server	Web
Print Compa-ratio Report	People » Compensation » Compensation Reports » Print Compa-ratio	Not in Costpoint Web
Print Employee Compensation Plan Report	People » Compensation » Compensation Reports » Print Employees by Plan by Grade	Not in Costpoint Web

Compensation Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Compensation » Compensation Controls	Client/Server	Web
Configure Compensation Settings	People » Compensation » Compensation Controls » Compensation Settings	Not in Costpoint Web

Personnel

Personnel Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Personnel » Personnel Information	Client/Server	Web
Manage Required Forms List	People » Personnel » Personnel Actions » Required Forms List	Not in Costpoint Web

Manage Personnel Actions	People » Personnel » Personnel Actions » Personnel Actions	Not in Costpoint Web
Print Required Forms Listing by Personnel Action	People » Personnel » Personnel Actions » Print Required Forms Listing by Personnel Action	Not in Costpoint Web
Manage Exit Interview Form	People » Personnel » Exit Interview Setup » Exit Interview Form Setup	Not in Costpoint Web

Security and Company Property

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Personnel » Security and Company Property	Client/Server	Web
Manage Federal Security Codes	People » Personnel » Security and Company Property » Federal Security Identifiers	Not in Costpoint Web
Manage Internal Security Codes	People » Personnel » Security and Company Property » Internal Security Identifiers	Not in Costpoint Web
Manage Company Documents	People » Personnel » Security and Company Property » Company Documents	Not in Costpoint Web
Manage Company Property	People » Personnel » Security and Company Property » Company Property	Not in Costpoint Web
Manage Company Vehicles	People » Personnel » Security and Company Property » Company Vehicles	Not in Costpoint Web

Position Requirements

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Personnel » Position Requirements	Client/Server	Web
Manage Position Requisition Approvers	People » Personnel » Personnel Requisitions » Requisition Approvers	Not in Costpoint Web
Manage Position Requisition Request	People » Personnel » Personnel Requisitions » Position Requisition Request	Not in Costpoint Web
Approve Position Requisitions	People » Personnel » Personnel Requisitions » Approve Position Requisitions	Not in Costpoint Web

Education, Skills and Training

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Personnel » Education, Skills and Training	Client/Server	Web
Manage Areas of Study Codes	People » Personnel » Training » Areas of Study	Not in Costpoint Web
Manage Course Codes	People » Personnel » Training » Courses	Not in Costpoint Web
Manage Degree Codes	People » Personnel » Training » Degrees	Not in Costpoint Web
Manage Professional Organization Codes	People » Personnel » Training » Professional Organizations	Not in Costpoint Web
Manage Skill Codes	People » Personnel » Training » Skills	Not in Costpoint Web
Manage Skill Level Codes	People » Personnel » Training » Skill Levels	Not in Costpoint Web
Manage Training Codes	People » Personnel » Training » Training	Not in Costpoint Web

Manage Training Location Codes	People » Personnel » Training » Training Location	Not in Costpoint Web
Manage Training Source Codes	People » Personnel » Training » Training Source	Not in Costpoint Web
Manage Training Program Schedules	People » Personnel » Training » Training Program Schedules	Not in Costpoint Web
Print Training Program Schedule	People » Personnel » Training » Print Program Schedules	Not in Costpoint Web

Work-Related Injuries/Illnesses

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Personnel » Work-Related Injuries/Illnesses	Client/Server	Web
Manage Anatomy Codes	People » Personnel » OSHA/Worker's Comp » Anatomy Description	Not in Costpoint Web
Manage Injury/Illness Codes	People » Personnel » OSHA/Worker's Comp » Injury/Illness Description	Not in Costpoint Web
Manage Accident Processing Steps	People » Personnel » OSHA/Worker's Comp » Accident Processing Steps	Not in Costpoint Web
Manage Workers' Compensation Filing Reasons	People » Personnel » OSHA/Worker's Comp » Worker's Comp Filing Reasons	Not in Costpoint Web
Manage Accident Information	People » Personnel » OSHA/Worker's Comp » Accident Info	Not in Costpoint Web
Print Worker's Compensation Incident Report	People » Personnel » OSHA/Worker's Comp » Print Worker's Comp Incident Report	Not in Costpoint Web

Manage Accident Case History	People » Personnel » OSHA/Worker's Comp » Accident Case History	Not in Costpoint Web
Print Accident Case History Report	People » Personnel » OSHA/Worker's Comp » Print Accident Case History Report	Not in Costpoint Web
Print OSHA Report	People » Personnel » OSHA/Worker's Comp » Print OSHA Report	Not in Costpoint Web
Print Wage History Report	People » Personnel » OSHA/Worker's Comp » Print Wage History Report	Not in Costpoint Web

Personnel Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Personnel » Personnel Controls	Client/Server	Web
Configure Personnel Settings	People » Personnel » Personnel Controls » Personnel Settings	Not in Costpoint Web
Manage Award Codes	People » Personnel » Personnel Controls » Award Codes	Not in Costpoint Web
Manage Drug Test Codes	People » Personnel » Personnel Controls » Drug Tests	Not in Costpoint Web
Manage I-9 Codes	People » Personnel » Personnel Controls » I-9 Codes	Not in Costpoint Web
Manage Managers/HR Reps by HR Organization	People » Personnel » Personnel Controls » Managers/HR Reps by HR Org	Not in Costpoint Web
Manage Managers/HR Reps by Organization	People » Personnel » Personnel Controls » Managers/HR Reps by Org	Not in Costpoint Web

Manage Medical Surveillance Codes	People » Personnel » Personnel Controls » Medical Surveillance Codes	Not in Costpoint Web
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Affirmative Action

Affirmative Action Plan Information

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Affirmative Action » Affirmative Action Plan Information	Client/Server	Web
Manage Affirmative Action Plans	People » Affirmative Action » Affirmative Action Plan Setup » Affirmative Action Plans	Not in Costpoint Web
Manage Affirmative Action Census Data	People » Affirmative Action » Affirmative Action Plan Setup » Census Data	Not in Costpoint Web
Manage Applicant Data	People » Affirmative Action » Applicant Information » Applicant Data	Not in Costpoint Web

Affirmative Action Reports

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Affirmative Action » Affirmative Action Reports	Client/Server	Web
Print Employee Roster	People » Affirmative Action » Employee Reports » Employee Roster	Not in Costpoint Web
Print New Hire Analysis Report	People » Affirmative Action » Employee Reports » New Hire Analysis	Not in Costpoint Web

People

Print Personnel Action Analysis Report	People » Affirmative Action » Employee Reports » Personnel Action Analysis	Not in Costpoint Web
Print Promotion Report	People » Affirmative Action » Employee Reports » Promotion Report	Not in Costpoint Web
Print Termination Report	People » Affirmative Action » Employee Reports » Termination Report	Not in Costpoint Web
Print Training Report	People » Affirmative Action » Employee Reports » Training Report	Not in Costpoint Web
Print Transfer Report	People » Affirmative Action » Employee Reports » Transfer Report	Not in Costpoint Web
Print Availability/Utilization Report	People » Affirmative Action » Affirmative Action Planning » Availability/Utilization Report	Not in Costpoint Web
Print EEO-1 Report	People » Affirmative Action » Affirmative Action Planning » EEO-1 Report	Not in Costpoint Web
Print Job Group Analysis Report	People » Affirmative Action » Affirmative Action Planning » Job Group Analysis Report	Not in Costpoint Web
Print Lines of Progression Report	People » Affirmative Action » Affirmative Action Planning » Lines of Progression	Not in Costpoint Web
Print Organizational Profile Report	People » Affirmative Action » Affirmative Action Planning » Organizational Profile	Not in Costpoint Web
Print VETS-100 Report	People » Affirmative Action » Affirmative Action Planning » Print VETS-100 Report	Not in Costpoint Web
Print Workforce Analysis Report	People » Affirmative Action » Affirmative Action Planning » Workforce Analysis Report	Not in Costpoint Web

Affirmative Action Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Affirmative Action » Affirmative Action Controls	Client/Server	Web
Configure Affirmative Action Settings	People » Affirmative Action » Affirmative Action Controls » Affirmative Action Settings	Not in Costpoint Web
Manage Functional Job Title Hierarchy	People » Affirmative Action » Affirmative Action Controls » Feeder Positions	Not in Costpoint Web
Manage Job Groups	People » Affirmative Action » Affirmative Action Controls » Job Groups	Not in Costpoint Web

Deferred Compensation Admin

Deferred Compensation Plan Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Deferred Compensation Admin » Deferred Compensation Plan Controls	Client/Server	Web
Manage Deferred Compensation Plans	People » Deferred Compensation Admin » Plan Controls » Plan Setup	Not in Costpoint Web
Manage Deferred Compensation Deductions	People » Deferred Compensation Admin » Plan Controls » Deduction Code Assignment	Not in Costpoint Web

Benefits

Benefit Entry and Creation

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Benefits » Benefit Entry and Creation	Client/Server	Web
Manage Benefit Plans	People » Benefits » Benefit Information » Benefit Plan Setup	Not in Costpoint Web
Manage Benefit Packages	People » Benefits » Benefit Information » Benefit Packages	Not in Costpoint Web
Manage Benefit Package Defaults	People » Benefits » Benefit Information » Benefit Package Defaults	Not in Costpoint Web
Manage Dependent Care FSA Plan Year	People » Benefits » Benefit Information » Dependent Care FSA Setup	Not in Costpoint Web
Manage Medical Care FSA Plan Year	People » Benefits » Benefit Information » Medical Care FSA Setup	Not in Costpoint Web

Benefit Reports

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Benefits » Benefit Reports	Client/Server	Web
Print Census Report	People » Benefits » Reports » Print Census Report	Not in Costpoint Web
Print Coverage Report	People » Benefits » Reports » Print Coverage Report	Not in Costpoint Web

Print Employee FSA Report	People » Benefits » Reports » Print Employee FSA Report	Not in Costpoint Web
Print Life Insurance Beneficiaries Report	People » Benefits » Reports » Print Life Insurance Beneficiaries Report	Not in Costpoint Web
Print Medical Dependents Report	People » Benefits » Reports » Print Medical Dependents Report	Not in Costpoint Web

Benefit Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
People » Benefits » Benefit Controls	Client/Server	Web
Configure Benefit Settings	People » Benefits » Benefit Controls » Benefit Settings	Not in Costpoint Web
Manage Benefit Providers	People » Benefits » Benefit Controls » Providers	Not in Costpoint Web
Manage Benefit Types	People » Benefits » Benefit Controls » Benefit Types	Not in Costpoint Web
Manage Coverage Options	People » Benefits » Benefit Controls » Coverage Options	Not in Costpoint Web
Manage Coverage Amounts by Age	People » Benefits » Premium and Coverage Tables » Coverage Amounts by Age	Not in Costpoint Web
Manage Coverage Amounts by Salary	People » Benefits » Premium and Coverage Tables » Coverage Amounts by Salary	Not in Costpoint Web
Manage Premium Rates by Age	People » Benefits » Premium and Coverage Tables » Premium Rates by Age	Not in Costpoint Web

Manage Premiums by Salary	People » Benefits » Premium and Coverage Tables » Premium Amounts by Salary	Not in Costpoint Web
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Materials

Product Definition

Items

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Items	Client/Server	Web
Manage Parts	Materials » Product Definition » Part Master » Maintain Parts Materials » Product Definition » Part Master » Basic Part Data	Materials » Maintain » Items » Parts User Flow
Manage Services	Materials » Product Definition » Services	Materials » Maintain » Items » Services User Flow
Manage Goods	Materials » Product Definition » Goods	Materials » Maintain » Items » Goods User Flow
Assign Vendors to Items	Materials » Product Definition » Assign Vendors	Materials » Maintain » Items » Item Vendor Assignment
Manage Alternate Parts	Materials » Product Definition » Part Master » Alternate Parts	Materials » Maintain » Items » Alternate Parts
Manage Part Project Data	Materials » Product Definition » Part Master » Part Project Data	Materials » Maintain » Items » Part Project Data
Manage Item Costs	Materials » Product Definition » Maintain Item Cost	Materials » Maintain » Items » Item Costs
Manage Project Item Costs	Materials » Product Definition » Maintain Project Item Cost	Materials » Maintain » Items » Project Item Costs

Provisional Parts

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Provisional Parts	Client/Server	Web
Manage Provisional Parts	Materials » Product Definition » Provisional Parts » Maintain Provisional Parts	Not in Costpoint Web
Convert Provisional Parts to Standard Parts	Materials » Product Definition » Provisional Parts » Convert Provisional Parts to Standard Parts	Not in Costpoint Web

Documents

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Documents	Client/Server	Web
Manage Documents	Materials » Product Definition » Documents » Maintain Documents	Not in Costpoint Web
Release Documents	Materials » Product Definition » Documents » Release Documents	Not in Costpoint Web

Product Billing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Product Billing	Client/Server	Web
Manage Warranty Information	Materials » Product Definition » Product Billing » Set Up Warranty Info	Not in Costpoint Web

Materials

Manage Item Billings	Materials » Product Definition » Product Billing » Set Up Item Billings	Materials » Maintain » Items » Item Billings
Manage Price Catalogs	Materials » Product Definition » Product Billing » Set Up Price Catalogs	Materials » Maintain » Price Catalogs » Price Catalogs
Manage Product Price Catalogs	Materials » Product Definition » Product Billing » Set Up Product Price Catalogs	Materials » Maintain » Price Catalogs » Price Catalogs Items
Manage Product Options	Materials » Product Definition » Product Billing » Set Up Product Options	Not in Costpoint Web

Product Definition Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Product Definition Reports/Inquiries	Client/Server	Web
Print Assigned Vendor Report	Materials » Product Definition » Reports » Print Assigned Vendor Report	Not in Costpoint Web
Print Item Catalog Report	Materials » Product Definition » Reports » Print Item Catalog	Not in Costpoint Web
Print Item Cost Report	Materials » Product Definition » Reports » Print Item Cost Info	Not in Costpoint Web
Print Item Master Audit Report	Materials » Product Definition » Reports » Print Master File Audit Report	Not in Costpoint Web
Print Item Master Listing Report	Materials » Product Definition » Reports » Print Master File Listing	Not in Costpoint Web
Print Item Text Report	Materials » Product Definition » Reports » Print Item Text Report	Not in Costpoint Web

Print Manufacturer Catalog Report	Materials » Product Definition » Reports » Print Manufacturer Catalog	Not in Costpoint Web
Print Part Planning Exception Report	Materials » Product Definition » Reports » Print Part Planning Exception Report	Not in Costpoint Web
Print Part Project Report	Materials » Product Definition » Reports » Print Part Project Info	Not in Costpoint Web
Print Substitute Part Report	Materials » Product Definition » Reports » Print Substitute Part Report	Not in Costpoint Web
View Items	Materials » Product Definition » Inquiries » Item Inquiry	Materials » Review » Items » Item Inquiry
View Alternate Parts	Materials » Product Definition » Inquiries » Alternate Part Inquiry	Materials » Review » Items » Alternate Part Inquiry

Product Definition Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Product Definition Interfaces	Client/Server	Web
Import Items	Others » Product Interfaces » Preprocessors » Item Preprocessor	Not in Costpoint Web

Product Definition Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Product Definition Controls	Client/Server	Web
Configure Product Definition Settings	Materials » Product Definition » Product Definition Controls » Product Definition Settings	Administration » Configure » Materials » Product Definition Settings
Manage Security Groups	Not in Client/Server	Administration » Configure » Materials » Security Groups
Manage Commodity Codes	Materials » Product Definition » Product Definition Controls » Commodity Codes	Materials » Configure » Items » Commodity Codes
Manage Industry Classifications	Materials » Product Definition » Product Definition Controls » Industry Classifications	Not in Costpoint Web
Manage Item User-Defined Labels	Materials » Product Definition » Product Definition Controls » Item User-Defined Labels	Not in Costpoint Web
Manage Manufacturers	Materials » Product Definition » Product Definition Controls » Manufacturers	Materials » Maintain » Manufacturers » Manufacturers
Manage Part Preference Types	Materials » Product Definition » Product Definition Controls » Part Preference Types	Not in Costpoint Web
Manage Product Classifications	Materials » Product Definition » Product Definition Controls » Product Classifications	Materials » Configure » Items » Product Classifications
Manage Product Types	Materials » Product Definition » Product Definition Controls » Product Types	Not in Costpoint Web
Manage Provisional Part Types	Materials » Product Definition » Product Definition Controls » Provisional Part Types	Not in Costpoint Web

Manage Standard Text	Materials » Product Definition » Product Definition Controls » Standard Text	Materials » Configure » Standard Text » Standard Text
Manage Units of Measure	Materials » Product Definition » Product Definition Controls » Units of Measure	Not in Costpoint Web
Manage Document Media	Materials » Product Definition » Product Definition Controls » Document Media	Not in Costpoint Web
Manage Document Sizes	Materials » Product Definition » Product Definition Controls » Document Sizes	Not in Costpoint Web
Manage Document Types	Materials » Product Definition » Product Definition Controls » Document Types	Not in Costpoint Web
Manage Document Maintenance Groups	Not in Costpoint Client/Server	Not in Costpoint Web

Pard Data Security

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Product Definition » Product Data Security	Client/Server	Web
Manage United States Munitions List	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Export Control Classification Numbers	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Security User-Defined Labels	Not in Costpoint Client/Server	Not in Costpoint Web
Manage License/Agreement Types	Not in Costpoint Client/Server	Not in Costpoint Web
Manage License/Agreements	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Security Groups	Not in Costpoint Client/Server	Not in Costpoint Web

View Part Data Security Audit Log	Not in Costpoint Client/Server	Not in Costpoint Web
Purge Part Security Log	Not in Costpoint Client/Server	Not in Costpoint Web

Bills of Material

Bills of Material

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Bills of Material » Bills of Material	Client/Server	Web
Manage Manufacturing Bills of Material	Materials » Bills of Material » Manufacturing Bills of Material » Maintain MBOM	Not in Costpoint Web
Release Manufacturing Bills of Material	Materials » Bills of Material » Manufacturing Bills of Material » Release MBOM	Not in Costpoint Web
Release Multiple Manufacturing Bills of Material	Materials » Bills of Material » Manufacturing Bills of Material » Release Multiple Manufacturing BOMs	Not in Costpoint Web
Manage Engineering Bills of Material	Materials » Bills of Material » Engineering Bills of Material » Maintain EBOM	Not in Costpoint Web
Release Engineering Bills of Material	Materials » Bills of Material » Engineering Bills of Material » Release EBOM	Not in Costpoint Web
Release Multiple Engineering Bills of Material	Materials » Bills of Material » Engineering Bills of Material » Release Multiple Engineering BOMs	Not in Costpoint Web
Manage End Item Configurations	Materials » Bills of Material » Manufacturing Bills of Material » Maintain End Item Configurations	Not in Costpoint Web

Materials

Copy Bills of Material	Materials » Bills of Material » Documents » Copy Bills of Material	Not in Costpoint Web
Apply Mass Component Changes to Bills of Material	Materials » Bills of Material » Documents » Perform Mass Component Change	Not in Costpoint Web
Compute Costed Bills of Material	Materials » Bills of Material » Reports » Print Costed BOM Report	Not in Costpoint Web

Documents

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Bills of Material » Documents	Client/Server	Web
Manage Documents	Materials » Bills of Material » Documents » Maintain Documents	Not in Costpoint Web
Release Documents	Materials » Bills of Material » Documents » Release Documents	Not in Costpoint Web

Work Centers

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Bills of Material » Work Centers	Client/Server	Web
Manage Work Centers	Materials » Bills of Material » Bills of Material Controls » Work Centers	Not in Costpoint Web

Bills of Material Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Bills of Material » Bills of Material Reports/Inquiries	Client/Server	Web
Print Bills of Material Where-Used Report	Materials » Bills of Material » Reports » Print Where-Used Report	Not in Costpoint Web
Print Indented Bills of Material Report	Materials » Bills of Material » Reports » Print Indented BOM Report	Not in Costpoint Web
Print Summarized Bills of Material Report	Materials » Bills of Material » Reports » Print Summarized BOM Report	Not in Costpoint Web
Print Summarized Bills of Material Comparison Report	Materials » Bills of Material » Reports » Print Compare Summarized BOM Report	Not in Costpoint Web
View Bills of Material	Materials » Bills of Material » Inquiries » BOM Inquiry	Not in Costpoint Web
View Where-Used Bills of Material	Materials » Bills of Material » Inquiries » Where-Used Inquiry	Not in Costpoint Web

Bills of Material Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Bills of Material » Bills of Material Utilities	Client/Server	Web
Update Low-Level Codes	Materials » Bills of Material » Utilities » Update Low-Level Codes	Not in Costpoint Web

Convert Reference Designators from Short to Long	Materials » Bills of Material » Utilities » Miscellaneous Toolkits » Convert reference designators from standard to extended length format*	Not in Costpoint Web
Convert Reference Designators from Long to Short	Materials » Bills of Material » Utilities » Miscellaneous Toolkits » Convert reference designators from extended length to standard format*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Bills of Material Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Bills of Material » Bills of Material Interfaces	Client/Server	Web
Import Bills of Material	Others » Product Interfaces » Preprocessors » Bills of Materials Preprocessor	Not in Costpoint Web

Bills of Material Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Bills of Material » Bills of Material Controls	Client/Server	Web
Configure Bills of Material Settings	Materials » Bills of Material » Bills of Material Controls » BOM Settings	Not in Costpoint Web
Manage Configuration Identifiers	Materials » Bills of Material » Bills of Material Controls » Configuration Identifiers	Not in Costpoint Web

Materials

Manage Document Maintenance Groups	Materials » Bills of Material » Bills of Material Controls » Document Maintenance Groups	Not in Costpoint Web
Manage Document Media	Materials » Bills of Material » Bills of Material Controls » Document Media	Not in Costpoint Web
Manage Document Sizes	Materials » Bills of Material » Bills of Material Controls » Document Sizes	Not in Costpoint Web
Manage Document Types	Materials » Bills of Material » Bills of Material Controls » Document Types	Not in Costpoint Web

Routings

Work Centers

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Routings » Work Centers	Client/Server	Web
Manage Work Centers	Materials » Routings » Maintain Work Centers	Not in Costpoint Web

Operations

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Routings » Operations	Client/Server	Web
Manage Labor Operations	Materials » Routings » Operations » Maintain Labor Operations	Not in Costpoint Web
Manage Subcontractor Operations	Materials » Routings » Operations » Maintain Subcontractor Operations	Not in Costpoint Web

Routings

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Routings » Routings	Client/Server	Web
Manage Routings	Materials » Routings » Routings » Maintain Routings	Materials » Maintain » Routings » Maintain Routings
Release Routings	Materials » Routings » Routings » Release Routings	Not in Costpoint Web

Routings Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Routings » Routings Reports/Inquiries	Client/Server	Web
Print Routings Report	Materials » Routings » Reports » Print Routings	Not in Costpoint Web
View Routings	Materials » Routings » Inquiries » Routing Inquiry	Not in Costpoint Web

Routings Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Routings » Routings Controls	Client/Server	Web
Configure Routing Settings	Materials » Routings » Routings Controls » Routings Settings	Not in Costpoint Web
Manage Work Center Types	Materials » Routings » Routings Controls » Work Center Types	Not in Costpoint Web

Manage Operation Types	Materials » Routings » Routings Controls » Operation Types	Not in Costpoint Web
Manage Process Types	Materials » Routings » Routings Controls » Process Types	Not in Costpoint Web
Manage Resource Types	Materials » Routings » Routings Controls » Resource Types	Not in Costpoint Web
Manage Key Resources	Materials » Routings » Routings Controls » Key Resources	Not in Costpoint Web
Manage Labor Classifications	Materials » Routings » Routings Controls » Labor Classifications	Not in Costpoint Web
Manage Maintenance Types	Materials » Routings » Routings Controls » Maintenance Types	Not in Costpoint Web
Manage Equipment	Materials » Routings » Routings Controls » Equipment	Not in Costpoint Web

Engineering Change Notices

Engineering Change Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Engineering Change Notices » Engineering Change Processing	Client/Server	Web
Manage Engineering Change Notices	Materials » Engineering Change Notices » Engineering Change Notices » Maintain ECNs	Not in Costpoint Web
Approve Engineering Change Notices	Materials » Engineering Change Notices » Engineering Change Notices » Approve ECNs	Not in Costpoint Web

Update Approved Engineering Change Notices	Materials » Engineering Change Notices » Engineering Change Notices » Maintain Approved ECNs	Not in Costpoint Web
Apply Engineering Change Notices	Materials » Engineering Change Notices » Engineering Change Notices » Implement ECN Changes	Not in Costpoint Web
Print Engineering Change Notice Travelers	Materials » Engineering Change Notices » Engineering Change Notices » Print ECN Traveler	Not in Costpoint Web

Engineering Change Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Engineering Change Notices » Engineering Change Reports/Inquiries	Client/Server	Web
Print Engineering Change Notice Impact Report	Materials » Engineering Change Notices » ECN Reports » Print ECN Impact Report	Not in Costpoint Web
View Engineering Change Notice Status	Materials » Engineering Change Notices » ECN Inquiries » ECN Status Inquiry	Not in Costpoint Web
View Items	Materials » Engineering Change Notices » ECN Inquiries » Item Inquiry	Materials » Review » Items » Item Inquiry

Engineering Change Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Engineering Change Notices » Engineering Change Controls	Client/Server	Web
Configure Engineering Change Notice Settings	Materials » Engineering Change Notices » ECN Controls » EC Settings	Not in Costpoint Web
Configure Engineering Change Report Print Options	Materials » Engineering Change Notices » ECN Controls » EC Report Print Options	Not in Costpoint Web
Configure Engineering Change User-Defined Labels	Materials » Engineering Change Notices » ECN Controls » EC User-Defined Labels	Not in Costpoint Web
Manage Engineering Change Reasons	Materials » Engineering Change Notices » ECN Controls » EC Reasons	Not in Costpoint Web
Manage Engineering Change Priorities	Materials » Engineering Change Notices » ECN Controls » EC Priorities	Not in Costpoint Web
Manage Engineering Change Rejection Reason Codes	Materials » Engineering Change Notices » ECN Controls » EC Rejection Reason Codes	Not in Costpoint Web
Manage EC Impacted Functional Groups	Materials » Engineering Change Notices » ECN Controls » EC Impacted Functional Groups	Not in Costpoint Web
Manage Engineering Change Types	Materials » Engineering Change Notices » ECN Controls » EC Types	Not in Costpoint Web
Manage Engineering Change Approval Titles	Materials » Engineering Change Notices » ECN Controls » EC Approval Titles	Not in Costpoint Web
Manage Engineering Change Project Approvers	Materials » Engineering Change Notices » ECN Controls » EC Project Approvers	Not in Costpoint Web

Manage Engineering Change Approval Processes	Materials » Engineering Change Notices » ECN Controls » EC Approval Processes	Not in Costpoint Web
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Procurement Planning

Purchase Requisitions

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Procurement Planning » Purchase Requisitions	Client/Server	Web
Manage Simple Purchase Requisitions	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Purchase Requisitions	Materials » Procurement Planning » Requisitions » Enter Requisitions	Materials » Transactions » Purchase Requisitions » Enter Purchase Requisitions
Approve Purchase Requisitions	Materials » Procurement Planning » Requisitions » Approve Purchase Requisitions	Materials » Transactions » Purchase Requisitions » Approve Purchase Requisitions
Approve Purchase Requisition Lines	Materials » Procurement Planning » Requisitions » Approve Purchase Requisition Lines	Materials » Transactions » Purchase Requisitions » Approve Purchase Requisition Lines
Assign Purchase Requisitions to Buyers	Materials » Procurement Planning » Requisitions » Assign Requisitions to Buyers	Materials » Transactions » Purchase Requisitions » Assign Purchase Requisitions to Buyers
Assign Purchase Requisition Lines to Buyers	Materials » Procurement Planning » Requisitions » Assign Requisition Lines to Buyers	Materials » Transactions » Purchase Requisitions » Assign Purchase Requisition Lines to Buyers
Apply PO Info to Purchase Requisitions	Materials » Procurement Planning » Requisitions » Requisition Processing	Materials » Transactions » Purchase Requisitions » Process Purchase Requisitions

Materials

Apply PO Info to Purchase Requisitions by Line	Materials » Procurement Planning » Requisitions » Requisition Processing by Line	Materials » Transactions » Purchase Requisitions » Process Purchase Requisitions by Line
Print Purchase Requisitions	Materials » Procurement Planning » Requisitions » Print Requisitions	Materials » Transactions » Purchase Requisitions » Print Purchase Requisitions
Manage Purchase Order Header Information	Materials » Procurement Planning » Requisitions » Set Up PO Header Info	Not in Costpoint Web
Create Purchase Orders	Materials » Procurement Planning » Requisitions » Create Purchase Orders	Materials » Transactions » Purchase Requisitions » Create Purchase Orders

Vendor Quotes

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Procurement Planning » Vendor Quotes	Client/Server	Web
Manage Request for Quotes By Item	Materials » Procurement Planning » Request for Quotes » Enter RFQs by Item	Materials » Transactions » Vendor Quotes » Enter RFQs by Item
Manage Request for Quotes By Vendor	Materials » Procurement Planning » Request for Quotes » Enter RFQs by Vendor	Materials » Transactions » Vendor Quotes » Enter RFQs by Vendor
Print Request for Quotes	Materials » Procurement Planning » Request for Quotes » Print RFQs	Materials » Transactions » Vendor Quotes » Print RFQs
Manage Vendor Quotes By Item	Materials » Procurement Planning » Request for Quotes » Enter Quotes by Item	Materials » Transactions » Vendor Quotes » Enter Quotes by Item
Manage Vendor Quotes By Vendor	Materials » Procurement Planning » Request for Quotes » Enter Quotes by Vendor	Materials » Transactions » Vendor Quotes » Enter Quotes by Vendor
View Vendor Quotes	Materials » Procurement Planning » Inquiries » Vendor Quote Inquiry	Not in Costpoint Web

Vendors

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Procurement Planning » Vendors	Client/Server	Web
Manage Vendors	Materials » Procurement Planning » Vendor Info » Maintain Vendors	Materials » Maintain » Vendors » Vendor User Flow
Compute Vendor Performance	Materials » Procurement Planning » Performance » Calculate Vendor Performance	Materials » Process » Vendors » Calculate Vendor Performance
View Vendor Performance	Materials » Procurement Planning » Performance » Vendor Performance Inquiry	Materials » Review » Vendors » Vendor Performance Inquiry
Print Vendor List	Materials » Procurement Planning » Vendor Info » Print Vendor Listing	Not in Costpoint Web
Print Vendor Information Report	Materials » Procurement Planning » Vendor Info » Print Vendor Information Reports	Not in Costpoint Web

Procurement Planning Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Procurement Planning » Procurement Planning Reports/Inquiries	Client/Server	Web
Print Purchase Requisition Approval Status Report	Materials » Procurement Planning » Reports » Print Requisition Approval Status Report	Not in Costpoint Web
Print Purchase Requisition Commitment Report	Materials » Procurement Planning » Reports » Print Requisition Commitments Detail	Not in Costpoint Web
View Item Purchasing Information	Materials » Procurement Planning » Inquiries » Item Purchasing Information Inquiry	Materials » Review » Purchase Orders » Item Purchasing Information Inquiry

View Items	Materials » Procurement Planning » Inquiries » Item Inquiry	Materials » Review » Items » Item Inquiry
View Purchase Requisition Status	Materials » Procurement Planning » Inquiries » Requisition Status Inquiry	Materials » Review » Purchase Requisitions » Purchase Requisition Status Inquiry

Procurement Planning Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Procurement Planning » Procurement Planning Interfaces	Client/Server	Web
Import Purchase Requisitions	Others » Product Interfaces » Preprocessors » Purchase Requisition Preprocessor	Not in Costpoint Web
Import Vendor Quotes	Others » Product Interfaces » Preprocessors » Vendor Quote Preprocessor	Not in Costpoint Web

Procurement Planning Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Procurement Planning » Procurement Planning Controls	Client/Server	Web
Configure Purchase Requisition Settings	Materials » Procurement Planning » Requisition Controls » Requisition Settings	Administration » Configure » Materials » Requisition Settings
Configure Purchase Requisition Print Options	Materials » Procurement Planning » Requisition Controls » Requisition Print Options	Administration » Configure » Materials » Requisition Print Options
Configure Vendor Quote Settings	Materials » Procurement Planning » Requisition Controls » RFQ Settings	Administration » Configure » Materials » RFQ Settings

Manage Procurement Types	Materials » Procurement Planning » Requisition Controls » Procurement Types	Materials » Configure » Purchasing » Procurement Types
Manage Purchase Requisition Approval Titles	Materials » Procurement Planning » Requisition Controls » Requisition Approval Titles	Materials » Configure » Purchase Requisitions » Purchase Requisition Approval Titles
Manage Purchase Requisition Approval Processes	Materials » Procurement Planning » Requisition Controls » Requisition Approval Processes	Materials » Configure » Purchase Requisitions » Purchase Requisition Approval Processes
Manage Purchase Requisition Cost Types	Materials » Procurement Planning » Requisition Controls » Requisition Cost Types	Not in Costpoint Web
Manage Purchase Requisition Rejection Reasons	Materials » Procurement Planning » Requisition Controls » Requisition Rejection Reasons	Materials » Configure » Purchase Requisitions » Purchase Requisition Rejection Reasons
Manage Purchase Requisition Types	Not in Costpoint Client/Server	Materials » Configure » Purchase Requisitions » Purchase Requisition Types
Manage Vendor Quote Types	Materials » Procurement Planning » Requisition Controls » Quote Types	Not in Costpoint Web
Manage Vendor Quote Award Reasons	Materials » Procurement Planning » Requisition Controls » Vendor Quote Award Reasons	Materials » Configure » Purchasing » Vendor Quote Award Reasons

Purchasing

Purchase Orders

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Purchasing » Purchase Orders	Client/Server	Web
Manage Purchase Orders	Materials » Purchasing » Purchase Orders » Enter POs	Materials » Transactions » Purchase Orders » Enter Purchase Orders
Approve Pending Purchase Orders	Materials » Purchasing » Purchase Orders » Open Pending POs	Materials » Transactions » Purchase Orders » Open Pending POs
Create Blanket Purchase Order Releases	Materials » Purchasing » Purchase Orders » Create Blanket Releases	Materials » Transactions » Purchase Orders » Create Blanket PO Releases
Expedite Purchase Orders	Materials » Purchasing » Purchase Orders » Expedite Purchase Orders	Materials » Transactions » Purchase Orders » Expedite Purchase Orders
Manage Purchase Order Expediting Notes	Materials » Purchasing » Purchase Orders » Maintain PO Expediting Notes	Materials » Transactions » Purchase Orders » Enter PO Expediting Notes
Create Purchase Order Change Orders	Materials » Purchasing » Purchase Orders » Create PO Change Orders	Materials » Transactions » Purchase Orders » Create PO Change Orders
Print Purchase Orders	Materials » Purchasing » Purchase Orders » Print POs	Materials » Transactions » Purchase Orders » Print Purchase Orders
Print Purchase Order Change Orders	Materials » Purchasing » Purchase Orders » Print Purchase Change Orders	Materials » Transactions » Purchase Orders » Print PO Change Orders
Update Subcontract Purchase Order Status	Materials » Purchasing » Purchase Orders » Update Subcontract PO Status	Materials » Transactions » Purchase Orders » Update Subcontract PO Status

Vendors

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Purchasing » Vendors	Client/Server	Web
Manage Vendors	Materials » Purchasing » Vendor Info » Maintain Vendors	Materials » Maintain » Vendors » Vendor User Flow
Print Vendor List	Materials » Purchasing » Vendor Info » Print Vendor Listing	Not in Costpoint Web
Print Vendor Information Reports	Materials » Purchasing » Vendor Info » Print Vendor Information Reports	Not in Costpoint Web

Purchasing Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Purchasing » Purchasing Reports/Inquiries	Client/Server	Web
Compute/Print Purchasing Commitments	Materials » Purchasing » Reports » Compute and Print Commitments	Materials » Process » Purchasing Commitments » Compute and Print Purchasing Commitments
Print Purchase Order Activity Report	Materials » Purchasing » Reports » Print PO Activity Report	Materials » Review » Purchase Orders » PO Activity Report
Print Purchase Order Expediting Report	Materials » Purchasing » Reports » Print PO Expediting Report	Materials » Review » Purchase Orders » PO Expediting Report
Print Purchase Order Register Report	Materials » Purchasing » Reports » Print PO Register	Materials » Review » Purchase Orders » PO Register Report
View Item Purchasing Information	Materials » Purchasing » Inquiries » Item Purchasing Information Inquiry	Materials » Review » Purchase Orders » Item Purchasing Information Inquiry

Materials

View Items	Materials » Purchasing » Inquiries » Item Inquiry	Materials » Review » Items » Item Inquiry
View Purchase Order Change Orders	Materials » Purchasing » Inquiries » PO Change Order Inquiry	Materials » Review » Purchase Orders » PO Change Order Inquiry
View Purchase Order Commitments Summary	Materials » Purchasing » Inquiries » PO Commitments Summary Inquiry	Materials » Review » Purchase Orders » PO Commitments Summary Inquiry
View Purchase Order Status	Materials » Purchasing » Inquiries » PO Status Inquiry	Materials » Review » Purchase Orders » PO Status Inquiry
View Vendor Performance	Materials » Procurement Planning » Performance » Vendor Performance Inquiry	Materials » Review » Vendors » Vendor Performance Inquiry
View Vendor Quotes	Materials » Purchasing » Inquiries » Vendor Quote Inquiry	Not in Costpoint Web

Purchasing Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Purchasing » Purchasing Utilities	Client/Server	Web
Archive Purchase Orders	Materials » Purchasing » Utilities » Archive Purchase Orders	Not in Costpoint Web
Reconcile Purchase Orders	Materials » Purchasing » Utilities » Reconcile Purchase Orders	Not in Costpoint Web

Purchasing Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Purchasing » Purchasing Interfaces	Client/Server	Web
Import Purchase Orders	Others » Product Interfaces » Preprocessors » PO Preprocessor	Not in Costpoint Web
Import Subcontract PO Status Updates	Others » Product Interfaces » Preprocessors » Subcontract PO Status Update Preprocessor	Not in Costpoint Web
Export eProcurement Addresses	Others » Product Interfaces » eProcurement » Download Addresses	Not in Costpoint Web
Export eProcurement PO Receipts	Others » Product Interfaces » eProcurement » Download PO Receipt Information	Not in Costpoint Web
Export eProcurement Proj/Acct/Org	Others » Product Interfaces » eProcurement » Download Project/Account/Org Information	Not in Costpoint Web
Export eProcurement Vendors	Others » Product Interfaces » eProcurement » Download Vendor Information	Not in Costpoint Web
Export eProcurement Inventory Abbreviations	Others » Product Interfaces » eProcurement » Download Inventory Abbreviations	Not in Costpoint Web
Export eProcurement Items and Line Charge Types	Others » Product Interfaces » eProcurement » Download Items and Line Charge Types	Not in Costpoint Web
Export eProcurement Requisitions	Others » Product Interfaces » eProcurement » Download Requisition Information	Not in Costpoint Web

Purchasing Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Purchasing » Purchasing Controls	Client/Server	Web
Configure Purchasing Settings	Materials » Purchasing » Purchasing Controls » PO Settings	Administration » Configure » Materials » Purchasing Settings
Configure Purchase Order Print Options	Materials » Purchasing » Purchasing Controls » PO Print Options	Administration » Configure » Materials » PO Print Options

Purchasing Codes

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Purchasing » Purchasing Codes	Client/Server	Web
Manage Branch Locations	Materials » Purchasing » Purchasing Controls » Branch Locations	Not in Costpoint Web
Manage Buyers	Materials » Purchasing » Purchasing Controls » Buyers	Materials » Configure » Purchasing » Buyers
Manage Commodity Codes	Materials » Purchasing » Purchasing Controls » Commodity Codes	Materials » Configure » Items » Commodity Codes
Manage Industry Classifications	Materials » Purchasing » Purchasing Controls » Industry Classifications	Not in Costpoint Web
Manage Line Charge Types	Materials » Purchasing » Purchasing Controls » PO Line Charge Types	Not in Costpoint Web
Manage Procurement Types	Materials » Purchasing » Purchasing Controls » Procurement Types	Not in Costpoint Web

Manage Standard Text	Materials » Purchasing » Purchasing Controls » PO Standard Text	Not in Costpoint Web
Manage Units of Measure	Materials » Purchasing » Purchasing Controls » Units of Measure	Not in Costpoint Web
View Ship IDs	Materials » Purchasing » Purchasing Controls » Display Ship IDs	Materials » Configure » Purchasing » Display Ship IDs

Receiving

Receiving

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Receiving » Receiving	Client/Server	Web
Manage Purchase Order Receipts	Materials » Receiving » Receiving » Receive Purchase Order	Materials » Transactions » Receipts » Receive Purchase Orders
Print Receipt Traveler	Materials » Receiving » Reports » Print Receipt Traveler	Materials » Transactions » Receipts » Print Receipt Traveler
Manage Quality Control Inspections	Materials » Receiving » Inspections » Enter QC Inspections	Materials » Transactions » Receipts » Enter QC Inspections
Manage Vendor Returns	Materials » Receiving » Inspections » Enter Vendor Returns	Materials » Transactions » Receipts » Enter Vendor Returns
Enter Miscellaneous Inventory Receipts	Materials » Receiving » Receiving » Receive Miscellaneous	Not in Costpoint Web

Receiving Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Receiving » Receiving Reports/Inquiries	Client/Server	Web
Print Pending Inspection Report	Materials » Receiving » Reports » Print Pending Inspections Report	Not in Costpoint Web
Print Receiving Log	Materials » Receiving » Reports » Print Receiving Log	Not in Costpoint Web
View Purchase Order Status	Materials » Receiving » Inquiries » PO Status Inquiry	Materials » Review » Purchase Orders » PO Status Inquiry

Receiving Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Receiving » Receiving Interfaces	Client/Server	Web
Import Purchase Order Receipts	Others » Product Interfaces » Preprocessors » PO Receipts Preprocessor	Not in Costpoint Web

Receiving Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Receiving » Receiving Controls	Client/Server	Web
Configure Receiving Settings	Materials » Receiving » Receiving Controls » Receiving Settings	Administration » Configure » Materials » Receiving Settings
Manage Vendor Rejection Reasons	Materials » Receiving » Receiving Controls » Vendor Rejection Reasons	Not in Costpoint Web

Inventory

Issues

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Issues	Client/Server	Web
Enter Manufacturing Order Issues	Materials » Inventory » Issues » Enter Manufacturing Order Issues	Materials » Transactions » Inventory » Enter Manufacturing Order Issues
Enter Issues to Project/Account/Org or PO	Materials » Inventory » Issues » Enter Issues	Not in Costpoint Web
Manage Sales Order Inventory Issues	Materials » Inventory » Issues » Enter Sales Order Inventory Issues	Not in Costpoint Web

Adjustments

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Adjustments	Client/Server	Web
Enter Cost Adjustments	Materials » Inventory » Adjustments » Enter Cost Adjustments	Not in Costpoint Web
Enter Quantity Adjustments	Materials » Inventory » Adjustments » Enter Quantity Adjustments	Not in Costpoint Web
Enter Scrap Adjustments	Materials » Inventory » Adjustments » Enter Scrap Adjustments	Not in Costpoint Web

Transfers

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Transfer	Client/Server	Web
Enter Inventory Transfers	Materials » Inventory » Transfers » Enter Inventory Transfers	Not in Costpoint Web
Enter Location Transfers	Materials » Inventory » Transfers » Enter Location Transfers	Not in Costpoint Web
Create Mass Inventory Transfers	Materials » Inventory » Transfers » Perform Mass Inventory Transfers	Not in Costpoint Web

Receipts

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Receipts	Client/Server	Web
Enter Miscellaneous Inventory Receipts	Materials »Receiving » Receiving » Receive Miscellaneous	Not in Costpoint Web

Reservations

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Reservations	Client/Server	Web
Manage Inventory Requests	Materials » Inventory » Reservations » Enter Inventory Requests	Not in Costpoint Web
Manage Inventory Reservations	Materials » Inventory » Reservations » Enter Reservations	Not in Costpoint Web

Manage PO/Req Inventory Reservations	Materials » Inventory » Reservations » Enter PO/Req Inventory Reservations	Not in Costpoint Web
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Physical Counts

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Physical Counts	Client/Server	Web
Update ABC Classifications	Materials » Inventory » Physical Counts » Perform ABC Analysis	Not in Costpoint Web
Create Physical Counts	Materials » Inventory » Physical Counts » Set Up Physical Count	Not in Costpoint Web
Manage Physical Counts	Materials » Inventory » Physical Counts » Maintain Physical Count List	Not in Costpoint Web
Print Physical Count Sheets	Materials » Inventory » Physical Counts » Print Physical Count Sheets	Not in Costpoint Web
Manage Actual Counts	Materials » Inventory » Physical Counts » Enter Actual Counts	Not in Costpoint Web
Create Physical Count Adjustments	Materials » Inventory » Physical Counts » Print Discrepancy Report and Create Adjustments	Not in Costpoint Web

Inventory Closing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Inventory Closing	Client/Server	Web
Post Inventory Journal	Materials » Inventory » Post Inventory Journal	Not in Costpoint Web

Inventory Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Inventory Reports/Inquiries	Client/Server	Web
Print Inventory Reorder Report	Materials » Inventory » Reports » Print Inventory Reorder Report	Not in Costpoint Web
Print Inventory Transaction History	Materials » Inventory » Reports » Print Inventory Transaction History Report	Not in Costpoint Web
Print Reservation Pick Lists	Materials » Inventory » Reports » Print Reservation Pick Lists	Not in Costpoint Web
Print Stock Status Report	Materials » Inventory » Reports » Print Stock Status Report	Not in Costpoint Web
Print Shelf Life Report	Not in Costpoint Client/Server	Not in Costpoint Web
View Inventory Transaction History	Materials » Inventory » Inquiries » Inventory Transaction History Inquiry	Not in Costpoint Web
View Items	Materials » Inventory » Inquiries » Item Inquiry	Materials » Review » Items » Item Inquiry
View Part Inventory	Materials » Inventory » Inquiries » Part Inventory Inquiry	Not in Costpoint Web
View Serial/Lot Information	Materials » Inventory » Inquiries » Serial/Lot Inquiry	Not in Costpoint Web

Inventory Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Inventory Interfaces	Client/Server	Web
Import Inventory Transactions	Others » Product Interfaces » Preprocessors » Inventory Transaction Preprocessor	Materials » Utilities » Import » Import Inventory Transactions

Inventory Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Inventory Utilities	Client/Server	Web
Close Inventory Fiscal Year	Materials » Inventory » Utilities » Close Inventory Fiscal Year	Not in Costpoint Web
Create UID Print File	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Serial/Lot Information	Materials » Inventory » Utilities » Serial/Lot Maintenance	Not in Costpoint Web
Reconcile Inventory Balances	Materials » Inventory » Utilities » Reconcile Transactions	Not in Costpoint Web

Inventory Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Inventory » Inventory Controls	Client/Server	Web
Configure Inventory Settings	Materials » Inventory » Inventory Controls » Inventory Settings	Not in Costpoint Web

Configure Serial/Lot Settings	Materials » Inventory » Inventory Controls » Serial/Lot Settings	Not in Costpoint Web
Configure Inventory Accounts	Materials » Inventory » Inventory Controls » Inventory Accounts	Not in Costpoint Web
Configure Default Project Inventory Accounts	Materials » Inventory » Inventory Controls » Default Project Inventory Accounts	Not in Costpoint Web
Configure Back Order Processing Settings	Materials » Inventory » Inventory Controls » Back Order Processing Settings	Not in Costpoint Web
Manage Serial/Lot User-Defined Labels	Materials » Inventory » Inventory Controls » Serial/Lot User-Defined Labels	Not in Costpoint Web
Manage Inventory Projects	Materials » Inventory » Inventory Controls » Inventory Projects	Not in Costpoint Web
Manage Plants	Not in Client/Server	Materials » Configure » Inventory » Plants
Manage Warehouses	Materials » Inventory » Inventory Controls » Warehouses	Not in Costpoint Web
Manage Locations	Materials » Inventory » Inventory Controls » Locations	Not in Costpoint Web
Manage Adjustment Reasons	Materials » Inventory » Inventory Controls » Adjustment Reasons	Not in Costpoint Web
Manage Scrap Reasons	Materials » Inventory » Inventory Controls » Scrap Reasons	Not in Costpoint Web

Production Control

Materials Planning

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Production Control » Materials Planning	Client/Server	Web
Compute Material Requirements	Materials » Production Controls » Production Controls » Process Material Requirements	Not in Costpoint Web

Manufacturing Orders

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Production Control » Manufacturing Orders	Client/Server	Web
Manage Manufacturing Orders	Materials » Production Controls » Manufacturing Orders » Enter Manufacturing Orders	Not in Costpoint Web
Expedite Manufacturing Orders	Materials » Production Controls » Manufacturing Orders » Expedite Manufacturing Orders	Not in Costpoint Web
Print Manufacturing Order Documentation	Materials » Production Controls » Manufacturing Orders » Print Manufacturing Order Documentation	Not in Costpoint Web
Enter Manufacturing Order Issues	Materials » Production Controls » Manufacturing Orders » Enter Manufacturing Order Issues	Not in Costpoint Web

Create MO Subcontractor Requisitions	Materials » Production Controls » Manufacturing Orders » Create MO Subcontractor Requisitions	Not in Costpoint Web
Enter Manufacturing Order Reliefs	Materials » Production Controls » Manufacturing Orders » Relieve Manufacturing Orders	Not in Costpoint Web
Manage MO Operation Completions	Materials » Production Controls » Shop Floor Control » Enter MO Operation Completions	Materials » Transactions » Manufacturing Orders » Enter MO Operation Completions
Manage MO Quality Control Inspection Results	Materials » Production Controls » Shop Floor Control » Enter MO QC Inspection Results	Materials » Transactions » Manufacturing Orders » Enter MO QC Inspection Results
Create MO WIP Variance Journal Entry	Materials » Production Controls » Shop Floor Control » Create MO WIP Variance Journal Entry	Not in Costpoint Web

Production Control Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Production Control » Production Control Reports/Inquiries	Client/Server	Web
Print Manufacturing Order Component Shortage Report	Materials » Production Controls » Reports » Print Component Shortage Report	Not in Costpoint Web
Print Manufacturing Order Cost Report	Materials » Production Controls » Reports » Print MO Cost Report	Not in Costpoint Web
View Manufacturing Order Status	Materials » Production Controls » Inquiries » Manufacturing Order Status Inquiry	Not in Costpoint Web
View Part Inventory	Materials » Production Controls » Inquiries » Part Inventory Inquiry	Not in Costpoint Web

Production Control Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Production Control » Production Control Utilities	Client/Server	Web
Update Manufacturing Order Costs	Materials » Production Controls » Utilities » Modify MO Costs	Not in Costpoint Web
Update Manufacturing Order Labor Costs	Materials » Production Controls » Utilities » Modify MO Labor Costs	Not in Costpoint Web

Production Control Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Production Control » Production Control Interfaces	Client/Server	Web
Configure Advanced Planning and Scheduling Parameters	Others » Product Interfaces » Advanced Planning and Scheduling » Advanced Planning and Scheduling Parameters	Not in Costpoint Web
Export Work Centers	Others » Product Interfaces » Advanced Planning and Scheduling » Download Work Centers	Not in Costpoint Web
Export Manufacturing Orders	Others » Product Interfaces » Advanced Planning and Scheduling » Download Manufacturing Orders	Not in Costpoint Web
Import Manufacturing Order Status Updates	Others » Product Interfaces » Advanced Planning and Scheduling » Upload MO Status Updates	Not in Costpoint Web

Production Control Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Production Control » Production Control Controls	Client/Server	Web
Configure Production Control Settings	Materials » Production Controls » Production Controls » Production Control Settings	Not in Costpoint Web
Configure Manufacturing Order Costing Options	Materials » Production Controls » Production Controls » MO Costing Options	Not in Costpoint Web
Configure Shop Floor Calendar	Materials » Production Controls » Production Controls » Shop Floor Calendar	Not in Costpoint Web
Configure MO Documentation Print Options	Materials » Production Controls » Production Controls » MO Documentation Print Options	Not in Costpoint Web
Manage Employee Project Manufacturing Status	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Inventory Abbreviation Peggings	Materials » Production Controls » Production Controls » Inventory Abbreviation Peggings	Not in Costpoint Web
Manage Manufacturing QC Rejection Reasons	Materials » Production Controls » Production Controls » Manufacturing Rejection Reasons	Not in Costpoint Web
Manage Netting Groups	Materials » Production Controls » Production Controls » Netting Groups	Not in Costpoint Web
Manage Planners	Materials » Production Controls » Production Controls » Planners	Not in Costpoint Web
Manage Supervisors	Materials » Production Controls » Production Controls » Supervisors	Not in Costpoint Web

Sales Order Entry

Customers

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Customers	Client/Server	Web
Manage Customers	Materials » Sales Order Entry » Customer Info » Maintain Customer	Materials » Maintain » Customers » Customers
Print Customer List	Materials » Sales Order Entry » Customer Info » Print Customer Listing	Not in Costpoint Web

Sales Orders

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Orders	Client/Server	Web
Manage Sales Orders	Materials » Sales Order Entry » Sales Order » Enter Sales Orders	Not in Costpoint Web
Approve Sales Orders	Materials » Sales Order Entry » Sales Order » Approve Sales Orders	Not in Costpoint Web
Manage Sales Orders Supervisor Screen	Materials » Sales Order Entry » Sales Order » Sales Order Supervisor Screen	Not in Costpoint Web
Print Sales Order Acknowledgements	Materials » Sales Order Entry » Sales Order » Print Sales Order Acknowledgments	Not in Costpoint Web
Manage Sales Order User-Defined Information	Materials » Sales Order Entry » Sales Order » Sales Order User-Defined Info	Not in Costpoint Web

Sales Order Material Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Material Processing	Client/Server	Web
Create Purchase Requisitions from Sales Orders	Materials » Sales Order Entry » Sales Order » Create Requisitions from Sales Orders	Not in Costpoint Web
Print Sales Order Pick Lists	Materials » Sales Order Entry » Sales Order Material Processing » Print Sales Order Pick Lists	Not in Costpoint Web
Manage Sales Order Inventory Issues	Materials » Sales Order Entry » Sales Order Material Processing » Enter Sales Order Inventory Issues	Not in Costpoint Web
Manage Sales Order Non-Inventory Issues	Materials » Sales Order Entry » Sales Order Material Processing » Enter Sales Order Non-Inventory Issues	Not in Costpoint Web

Sales Order Shipping

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Shipping	Client/Server	Web
Manage Shipping Transactions	Materials » Sales Order Entry » Shipping Transactions » Enter Shipping Transactions	Not in Costpoint Web
Print Shipping Labels	Materials » Sales Order Entry » Shipping Transactions » Print Shipping Labels	Not in Costpoint Web
Print Sales Order Packing Slips	Materials » Sales Order Entry » Shipping Transactions » Print Packing Slips	Not in Costpoint Web

Print DD250 Packing Slips	Materials » Sales Order Entry » Shipping Transactions » Print DD250 Packing Slips	Not in Costpoint Web
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Sales Order Invoices

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Invoices	Client/Server	Web
Create Invoices	Materials » Sales Order Entry » Invoices » Create Invoices	Not in Costpoint Web
Manage Invoices	Materials » Sales Order Entry » Invoices » Maintain Invoices	Not in Costpoint Web
Select Invoices Ready for Use/Acceptance	Materials » Sales Order Entry » Invoices » Ready for Use/Acceptance	Not in Costpoint Web
Manage Invoices Supervisor Screen	Materials » Sales Order Entry » Invoices » Invoice Supervisor Screen	Not in Costpoint Web
Print Sales Order Invoices	Materials » Sales Order Entry » Invoices » Print Invoices	Not in Costpoint Web
Print DD250 Invoices	Materials » Sales Order Entry » Invoices » Print DD250 Invoices	Not in Costpoint Web
Create WAWF Files	Materials » Sales Order Entry » Invoices » Create WAWF Files	Not in Costpoint Web

Sales Order Posting

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Posting	Client/Server	Web
Post Sales Order Journal	Materials » Sales Order Entry » Invoices » Post Sales Order Journal	Not in Costpoint Web

Sales Order Entry Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Entry Reports/Inquiries	Client/Server	Web
Print Sales Order Approval Status Report	Materials » Sales Order Entry » Reports » Print Sales Order Approval Status Report	Not in Costpoint Web
Print Sales Order Backlog Report	Materials » Sales Order Entry » Reports » Print Sales Order Backlog Report	Not in Costpoint Web
View Sales Analysis Information	Materials » Sales Order Entry » Inquiries » Sales Analysis Inquiry	Not in Costpoint Web
View Sales Order Status Information	Materials » Sales Order Entry » Inquiries » Sales Order Status Inquiry	Not in Costpoint Web
View Serial/Lot Information	Materials » Sales Order Entry » Inquiries » Serial/Lot Inquiry	Not in Costpoint Web

Sales Order Entry Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Entry Utilities	Client/Server	Web
Create EDI Invoice File	Materials » Sales Order Entry » Utilities » Create EDI Invoice File	Not in Costpoint Web
Create RFID Print File	Not in Costpoint Client/Server	Not in Costpoint Web
Create UID Print File	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Serial/Lot Information	Materials » Sales Order Entry » Utilities » Serial/Lot Maintenance	Not in Costpoint Web

Sales Order Entry Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Entry Interfaces	Client/Server	Web
Import Sales Orders	Others » Product Interfaces » Preprocessor » Sales Order Preprocessor	Materials » Utilities » Import » Import Sales Orders

Sales Order Entry Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Sales Order Entry » Sales Order Entry Controls	Client/Server	Web
Configure Sales Order Entry Settings	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Settings	Not in Costpoint Web
Configure Sales Order Defaults	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Defaults	Not in Costpoint Web
Configure Serial/Lot Settings	Materials » Sales Order Entry » Sales Order Entry Controls » Serial/Lot Settings	Not in Costpoint Web
Configure Sales Order Print Options	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Print Options	Not in Costpoint Web
Manage Sales Order Catalog Defaults	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Catalog Settings	Not in Costpoint Web
Manage Sales Order Project Defaults	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Project Settings	Not in Costpoint Web
Manage Order User-Defined Labels	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order User-Defined Labels	Not in Costpoint Web
Manage Serial/Lot User-Defined Labels	Materials » Sales Order Entry » Sales Order Entry Controls » Serial/Lot User-Defined Labels	Not in Costpoint Web
Manage Contractor Addresses	Materials » Sales Order Entry » Sales Order Entry Controls » Contractor Addresses	Not in Costpoint Web

Manage Deferred Revenue Amortization Schedules	Materials » Sales Order Entry » Sales Order Entry Controls » Deferred Revenue Amortization Schedules	Not in Costpoint Web
Manage Issued By Addresses	Materials » Sales Order Entry » Sales Order Entry Controls » Issued by Addresses	Not in Costpoint Web
Manage Sales Group Abbreviations	Materials » Product Definition » Product Billing » Set Up Sales Group Abbreviations	Not in Costpoint Web
Manage Sales Order Approval Titles	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Approval Titles	Not in Costpoint Web
Manage Sales Order Approval Processes	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Approval Processes	Not in Costpoint Web
Manage Sales Order Cost Types	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Cost Types	Not in Costpoint Web
Manage Line Charge Types	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Line Charge Types	Not in Costpoint Web
Manage Sales Order Rejection Reasons	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Rejection Reasons	Not in Costpoint Web
Manage Standard Text	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Order Standard Text	Not in Costpoint Web
Manage Sales Representatives	Materials » Sales Order Entry » Sales Order Entry Controls » Sales Representatives	Not in Costpoint Web
Manage Shipment Modes	Materials » Sales Order Entry » Sales Order Entry Controls » Shipment Modes	Not in Costpoint Web

Master Production Scheduling

Master Production Schedules

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Master Production Scheduling » Master Production Schedules	Client/Server	Web
Update Master Production Schedules	Materials » Master Production Scheduling » Master Production Scheduling » Generate Master Production Schedules	Not in Costpoint Web
Manage Master Production Schedules	Materials » Master Production Scheduling » Master Production Scheduling » Edit Master Production Schedule	Not in Costpoint Web
Copy Master Production Schedules	Materials » Master Production Scheduling » Master Production Scheduling » Copy Master Production Schedules	Not in Costpoint Web
Manage Master Production Schedule Action Messages	Materials » Master Production Scheduling » Master Production Scheduling » Edit MPS Action Messages	Not in Costpoint Web
Print Master Production Schedule Action Message Report	Materials » Master Production Scheduling » Master Production Scheduling » Print MPS Action Message Report	Not in Costpoint Web
Firm Master Production Schedule Planned Orders	Materials » Master Production Scheduling » Master Production Scheduling » Firm Planned Orders	Not in Costpoint Web

Planning Routings

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Master Production Scheduling » Planning Routings	Client/Server	Web
Create/Update Planning Routings	Materials » Master Production Scheduling » Planning Routings » Calculate Planning Routings	Not in Costpoint Web
Manage Planning Routings	Materials » Master Production Scheduling » Planning Routings » Maintain Planning Routings	Not in Costpoint Web

Rough-Cut Capacity Plan

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Master Production Scheduling » Rough-Cut Capacity Plan	Client/Server	Web
Create/Update Rough-Cut Capacity Plan	Materials » Master Production Scheduling » Master Production Scheduling » Generate Rough-Cut Capacity Plan	Not in Costpoint Web
View Rough-Cut Capacity Plan	Materials » Master Production Scheduling » Inquiries » Rough-Cut Capacity Plan Inquiry	Not in Costpoint Web

Material Production Scheduling Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Master Production Scheduling » Material Production Scheduling Reports/Inquiries	Client/Server	Web
Print Master Production Schedule Report	Materials » Master Production Scheduling » Reports » Print Master Production Schedule Report	Not in Costpoint Web
Print Production Backlog Report	Materials » Master Production Scheduling » Reports » Print Production Backlog Report	Not in Costpoint Web
View Items	Materials » Master Production Scheduling » Inquiries » Item Inquiry	Materials » Review » Items » Item Inquiry
View Part Inventory	Materials » Master Production Scheduling » Inquiries » Part Inventory Inquiry	Not in Costpoint Web

Master Production Scheduling Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Master Production Scheduling » Master Production Scheduling Controls	Client/Server	Web
Configure Master Production Scheduling Settings	Materials » Master Production Scheduling » MPS Controls » MPS Settings	Not in Costpoint Web
Manage Master Production Schedules Planning Codes	Materials » Master Production Scheduling » MPS Controls » MPS Planning Codes	Not in Costpoint Web
Manage Resource Types	Materials » Master Production Scheduling » MPS Controls » Resource Types	Not in Costpoint Web

Manage Key Resources	Materials » Master Production Scheduling » MPS Controls » Key Resources	Not in Costpoint Web
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Material Requirements Planning

Material Requirements Planning

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Material Requirements Planning » Material Requirements Planning	Client/Server	Web
Update Material Requirements Plan	Materials » Material Requirements Planning » Material Requirements Planning » Update Material Requirements Plan	Not in Costpoint Web
Expedite Manufacturing Orders	Materials » Material Requirements Planning » Material Requirements Planning » Expedite Manufacturing Orders	Not in Costpoint Web
Manage Detailed Part Schedule	Materials » Material Requirements Planning » Material Requirements Planning » Detailed Part Schedule	Not in Costpoint Web
Manage MRP Action Messages	Materials » Material Requirements Planning » Material Requirements Planning » Maintain MRP Action Messages	Not in Costpoint Web
Print MRP Action Message Report	Materials » Material Requirements Planning » Reports » Print MRP Action Message Report	Not in Costpoint Web
Firm Material Requirements Planning Planned Orders	Materials » Material Requirements Planning » Material Requirements Planning » Firm Planned Orders	Not in Costpoint Web

Material Requirements Planning Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Material Requirements Planning » Material Requirements Planning Reports/Utilities	Client/Server	Web
Print Detailed Part Availability Report	Materials » Material Requirements Planning » Reports » Print Detailed Part Availability Report	Not in Costpoint Web
Print Summary Part Availability Report	Materials » Material Requirements Planning » Reports » Print Summary Part Availability Report	Not in Costpoint Web
Print Bills of Material MRP Action Message Report	Materials » Material Requirements Planning » Reports » Print BOM MRP Action Message Report	Not in Costpoint Web
View Items	Materials » Material Requirements Planning » Inquiries » Item Inquiry	Materials » Review » Items » Item Inquiry
View Part Inventory	Materials » Material Requirements Planning » Inquiries » Part Inventory Inquiry	Not in Costpoint Web
View Summary Part Availability	Materials » Material Requirements Planning » Inquiries » Summary Part Availability Inquiry	Not in Costpoint Web

Material Requirements Planning Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Material Requirements Planning » Material Requirements Planning Utilities	Client/Server	Web
Update Low-Level Codes	Materials » Material Requirements Planning » Material Requirements Planning » Update Low-Level Codes	Not in Costpoint Web
Convert MO Status from Planned to Firmed Planned	Materials » Material Requirements Planning » Utilities » Toolkits » Change MO Status from Planned to Firm Planned*	Not in Costpoint Web
Update Netting Flags for MRB Locations	Materials » Material Requirements Planning » Utilities » Toolkits » Change Netting Flags for MRB Locations*	Not in Costpoint Web
Assign Planning Warehouses to Inventory Projects	Materials » Material Requirements Planning » Utilities » Toolkits » Assign Planning Warehouses to Inventory Projects*	Not in Costpoint Web
Assign Project Planning Warehouses to Req and PO Lines	Materials » Material Requirements Planning » Utilities » Toolkits » Assign Project Planning Warehouses to Req and PO Lines*	Not in Costpoint Web
Create Reservations for Pending Sales Orders	Materials » Material Requirements Planning » Utilities » Toolkits » Create Reservations for Pending Sales Orders*	Not in Costpoint Web
Create MRP Detail Report Table	Materials » Material Requirements Planning » Utilities » Toolkits » Populate MRP Report Detail Table*	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Material Requirements Planning Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Material Requirements Planning » Material Requirements Planning Controls	Client/Server	Web
Configure Materials Requirements Planning Settings	Materials » Material Requirements Planning » MRP Controls » MRP Settings	Not in Costpoint Web
Configure MRP Report Print Options	Materials » Material Requirements Planning » MRP Controls » MRP Report Print Options	Not in Costpoint Web
Manage Inventory Abbreviation Peggings	Materials » Material Requirements Planning » MRP Controls » Inventory Abbreviation Peggings	Not in Costpoint Web

Materials Estimating

Proposals

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Materials Estimating » Proposals	Client/Server	Web
Manage Proposals	Materials » Materials Estimating » Materials Estimating Controls » Maintain Proposal Master	Not in Costpoint Web

Proposal Bills of Material

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Materials Estimating » Proposal Bills of Material	Client/Server	Web
Manage Proposal Bills of Material	Materials » Materials Estimating » Proposals Bills of Material » Maintain Proposal BOM	Not in Costpoint Web
Copy Proposal Bills of Material	Materials » Materials Estimating » Proposals Bills of Material » Copy Proposal BOM	Not in Costpoint Web
Apply Mass Component Changes to Proposal BOMs	Materials » Materials Estimating » Proposals Bills of Material » Perform PBOM Mass Component Change	Not in Costpoint Web
Manage Provisional Parts	Materials » Materials Estimating » Materials Estimating Controls » Maintain Provisional Parts	Not in Costpoint Web

Proposal Item Costing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Materials Estimating » Proposal Item Costing	Client/Server	Web
Compute Proposal Item Costs	Materials » Materials Estimating » Proposal Item Costing » Compute Proposal Item Costs	Not in Costpoint Web
Manage Proposal BOM Cost Estimates - Indented	Materials » Materials Estimating » Proposal Item Costing » Maintain PBOM Cost Estimates - Indented	Not in Costpoint Web

Manage Proposal BOM Cost Estimates - Summarized	Materials » Materials Estimating » Proposal Item Costing » Maintain PBOM Cost Estimates - Summarized	Not in Costpoint Web
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Request for Quotes

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Materials Estimating » Request for Quotes	Client/Server	Web
Select Request for Quotes from Proposals	Materials » Materials Estimating » Request for Quotes » Select RFQs from Proposals	Not in Costpoint Web
Create Request for Quotes for Proposals	Materials » Materials Estimating » Request for Quotes » Create RFQs for Proposals	Not in Costpoint Web

Materials Estimating Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Materials Estimating » Materials Estimating Reports/Inquiries	Client/Server	Web
View Item Purchasing Information	Materials » Materials Estimating » Inquiries » Item Purchasing Information Inquiry	Materials » Review » Purchase Orders » Item Purchasing Information Inquiry
Print Proposal Bills of Material Exception Report	Materials » Materials Estimating » Reports » Print PBOM Exception Report	Not in Costpoint Web
Print Proposal Item Cost History Report	Materials » Materials Estimating » Reports » Print Proposal Item Cost History Report	Not in Costpoint Web
View Proposal BOM Where-Used Information	Materials » Materials Estimating » Inquiries » Proposal BOM Where-Used Inquiry	Not in Costpoint Web

View Vendor Performance	Materials » Materials Estimating » Inquiries » Vendor Performance Inquiry	Materials » Review » Vendors » Vendor Performance Inquiry
View Vendor Quotes	Materials » Materials Estimating » Inquiries » Vendor Quote Inquiry	Not in Costpoint Web

Materials Estimating Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Materials » Materials Estimating » Materials Estimating Controls	Client/Server	Web
Configure Materials Estimating Settings	Materials » Materials Estimating » Materials Estimating Controls » Materials Estimating Settings	Not in Costpoint Web
Manage Materials Estimating Cost Source Types	Materials » Materials Estimating » Materials Estimating Controls » ME Cost Source Types	Not in Costpoint Web
Manage Provisional Part Types	Materials » Materials Estimating » Materials Estimating Controls » Provisional Part Types	Not in Costpoint Web

Administration

System Administration

File Management

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » File Management	Client/Server	Web
Manage Alternate File Locations	Not in Costpoint Client/Server	Administration » Maintain » Files » Alternate File Locations
Export Files	Not in Costpoint Client/Server	Administration » Utilities » Files » File Download Manager

Printing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » Printing	Client/Server	Web
Manage Report Archive Categories	Not in Costpoint Client/Server	Administration » Maintain » Reports » Report Archive Categories
Manage Report Categories	Not in Costpoint Client/Server	Administration » Maintain » Reports » Report Categories
Manage Report Fonts	Not in Costpoint Client/Server	Administration » Maintain » Reports » Report Fonts
Manage Report Groups	Not in Costpoint Client/Server	Administration » Maintain » Reports » Report Groups

Manage System Printers	Others » Process Management » Setup » Maintain Printer IDs	Administration » Maintain » Printers » System Printers
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Workspace Customization

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » Workspace Customization	Client/Server	Web
Manage Standard Label Customizations	Not in Costpoint Client/Server	Not in Costpoint Web
Manage User Interface Profiles	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Extensibility Units	Not in Costpoint Client/Server	Not in Costpoint Web

System Administration Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » System Administration Reports/Inquiries	Client/Server	Web
Print Application Table Information Report	Not in Costpoint Client/Server	Administration » Review » Database » Application Table Information Report
Print Archived Reports	Not in Costpoint Client/Server	Administration » Review » Archived Reports » Archived Reports
Print Data Dictionary Report	Others » System Administration » System Utilities » Print Data Dictionary Report	Administration » Review » Database » Data Dictionary Report
Print Extensibility Unit Report	Not in Costpoint Client/Server	Not in Costpoint Web
Print Menu Report	Others » System Administration » System Utilities » Print Menu Report	Administration » Review » System Administration » Menu Report

Print My Menu Report	Others » System Administration » System Security » Print MyMenu Report	Not in Costpoint Web
Print Postal Codes Report	Others » System Administration » System Codes » Print Postal Codes Report	Not in Costpoint Web
Print Sales/Value Added Tax Report	Others » System Administration » System Codes » Print Sales/Value Added Tax Report	Not in Costpoint Web
View Costpoint License Information	From the Help menu, select About Costpoint.	Administration » Review » Licenses » Costpoint License Information
View Help About	From the Help menu, select About Costpoint.	Administration » Review » Help » About Costpoint
View Action and Report Status	Not in Costpoint Client/Server	Not in Costpoint Web

System Administration Interfaces

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » System Administration Interfaces	Client/Server	Web
Manage Interface Configuration and Scheduler	Others » Product Interfaces » Interface Controls » Interface Configuration and Scheduler	Not in Costpoint Web
Activate Instance Control	Others » Product Interfaces » Interface Controls » Instance Activation Control	Not in Costpoint Web
Manage Interface Elements	Others » Product Interfaces » Interface Controls » Maintain Interface Elements	Not in Costpoint Web
Manage Element Value Mappings	Others » Product Interfaces » Interface Controls » Maintain Element Value Mappings	Not in Costpoint Web

Configure Cobra Interface Settings	Others » Product Interfaces » Cobra Interface » Cobra Interface Settings	Not in Costpoint Web
Manage Cobra Charge Templates	Others » Product Interfaces » Cobra Interface » Maintain Cobra Charge Templates	Not in Costpoint Web
Manage Cobra Budget Element Templates	Others » Product Interfaces » Cobra Interface » Maintain Cobra Budget Element Templates	Not in Costpoint Web
Manage Cobra Cost Templates	Others » Product Interfaces » Cobra Interface » Maintain Cobra Cost Templates	Not in Costpoint Web
Manage Cobra Program Mapping	Others » Product Interfaces » Cobra Interface » Cobra Program Mapping	Not in Costpoint Web
Manage Cobra Extraction Parameters	Others » Product Interfaces » Cobra Interface » Cobra Extraction Parameters	Not in Costpoint Web
Compute Cobra Burden Costs	Others » Product Interfaces » Cobra Interface » Compute Cobra Burden Cost	Not in Costpoint Web
Manage Prior Year Cobra Costs	Others » Product Interfaces » Cobra Interface » Maintain Prior Year Cobra Costs	Not in Costpoint Web
Transfer GovWin Capture Management Data	Not in Costpoint Client/Server	Not in Costpoint Web
Configure Customer Options	Others » Product Interfaces » CRM/Gov Win/RP Integration » Configure Customer Options	Not in Costpoint Web
Configure Employee Options	Others » Product Interfaces » CRM/Gov Win/RP Integration » Configure Employee Options	Not in Costpoint Web
Configure Organization Options	Others » Product Interfaces » CRM/Gov Win/RP Integration » Configure Organization Options	Not in Costpoint Web

Configure Project Options	Others » Product Interfaces » CRM/Gov Win/RP Integration » Configure Project Options	Not in Costpoint Web
Configure Vendor Options	Others » Product Interfaces » CRM/Gov Win/RP Integration » Configure Vendor Options	Not in Costpoint Web
Manage Project Level Mapping	Others » Product Interfaces » CRM/Gov Win/RP Integration » Maintain Project Level Mapping	Not in Costpoint Web
Configure Client Upload Options	Others » Product Interfaces » CRM/Gov Win/RP Integration » Configure Client Upload Options	Not in Costpoint Web
Configure Project Upload Options	Others » Product Interfaces » CRM/Gov Win/RP Integration » Configure Project Upload Options	Not in Costpoint Web

System Administration Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » System Administration Controls	Client/Server	Web
Configure System Settings	Others » System Administration » System Settings	Administration » Configure » System » System Settings
Manage Locales	Not in Costpoint Client/Server	Administration » Maintain » Reports » Report Locales
Set Up Company	Others » System Administration » Set Up Company	Not in Costpoint Web
Configure User Preferences	Open the Options menu on the toolbar. Select Preferences, then Maintain General Preferences.	Administration » Maintain » Users » User Preferences

Manage Construction Industry Scheme Codes	Others » System Administration » System Codes » Maintain CIS Codes	Not in Costpoint Web
Manage Countries	Others » System Administration » System Codes » Maintain Countries	Administration » Maintain » Codes » Countries
Manage Customs Declaration Point	Others » System Administration » System Codes » Maintain Customs Declaration Point	Not in Costpoint Web
Manage Customs Traffic Direction Codes	Others » System Administration » System Codes » Maintain Customs Traffic Direction Codes	Not in Costpoint Web
Manage European Union Commodity Codes	Others » System Administration » System Codes » Maintain EC Commodity Codes	Not in Costpoint Web
Manage European Union Correction Codes	Others » System Administration » System Codes » Maintain EC Correction Codes	Not in Costpoint Web
Manage European Union Countries	Others » System Administration » System Codes » Maintain EC Countries	Not in Costpoint Web
Manage European Union Mode of Transportation	Others » System Administration » System Codes » Maintain EC Mode of Transportation	Not in Costpoint Web
Manage EU Nature of Transaction Codes (NOTC)	Others » System Administration » System Codes » Maintain EC Nature of Transaction Codes (NOTC)	Not in Costpoint Web
Manage Postal Codes	Others » System Administration » System Codes » Maintain Postal Codes	Administration » Maintain » Codes » Postal Codes
Manage Sales or Value Added Taxes	Others » System Administration » System Codes » Maintain Sales/Value Added Tax	Not in Costpoint Web
Manage States and Provinces	Others » System Administration » System Codes » Maintain States and Provinces	Administration » Maintain » Codes » States and Provinces

Manage Tax Types	Others » System Administration » System Codes » Maintain Tax Types	Not in Costpoint Web
Manage Value Added Tax Supply Codes	Others » System Administration » System Codes » Maintain VAT Supply Codes	Not in Costpoint Web

System Administration Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » System Administration Utilities	Client/Server	Web
Activate/Inactivate Costpoint Usage	Others » System Administration » System Utilities » Enable/Disable Costpoint Usage	Not in Costpoint Web
Clear Users	Others » System Administration » System Utilities » Clear User(s)	Administration » Utilities » System Administration » Clear Users
Purge Report Table Data	Others » System Administration » DBA Utilities » Purge Report Table Data	Not in Costpoint Web
Rebuild Global Settings	Not in Costpoint Client/Server	Administration » Utilities » System Administration » Reload Global Settings
Rebuild Upgraded Tables	Others » System Administration » Utilities » Miscellaneous Toolkits » Upgrade Clean-up*	Not in Costpoint Web
Resize Dynamic Tables and Indexes	Others » System Administration » DBA Utilities » Size Dynamic Tables and Indexes	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.

Content Management

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » System Administration » Content Management	Client/Server	Web
Manage Content Types	Not in Costpoint Client/Server	Not in Costpoint Web
Manage Application/Content Links	Not in Costpoint Client/Server	Not in Costpoint Web

Security

System Security

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Security » System Security	Client/Server	Web
Manage User Groups	Others » System Administration » System Security » Maintain User Groups	Administration » Maintain » Users » User Groups
Manage Users	Others » System Administration » System Security » Maintain Users	Administration » Maintain » Users » Users

Organizational Security

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Security » Organizational Security	Client/Server	Web
Activate/Inactivate Organization Security by Module	Others » System Administration » Organization Security » Enable/Disable Org Security for Modules	Administration » Maintain » Organizational Security » Module Organization Security

Manage Organization Security Profiles	Others » System Administration » Organization Security » Maintain Org Security Profiles	Not in Costpoint Web
Manage Organization Security Groups	Others » System Administration » Organization Security » Maintain Org Security Groups	Not in Costpoint Web
Update Organization Security Profiles	Others » System Administration » Organization Security » Update Org Security Profiles	Not in Costpoint Web

Segregation of Duties

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Security » Segregation of Duties	Client/Server	Web
Manage Segregation of Duties Conflict Types	Not in Costpoint Client/Server	Administration » Maintain » Segregation of Duties » Segregation of Duties Conflict Types
Manage Application Conflicts	Not in Costpoint Client/Server	Administration » Maintain » Segregation of Duties » Conflicting Applications
Identify Segregation of Duties Conflicts	Not in Costpoint Client/Server	Administration » Process » Segregation of Duties » Identify Segregation of Duties Conflicts
Manage Segregation of Duties Conflict Overrides	Not in Costpoint Client/Server	Administration » Process » Segregation of Duties » Override Segregation of Duties Conflicts

Archived Report Security

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Security » Archived Report Security	Client/Server	Web
Manage Archived Report Security Rights	Not in Costpoint Client/Server	Administration » Review » Archived Reports » Archived Reports

Security Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Security » Security Reports/Inquiries	Client/Server	Web
Print Effective User Rights Report	Others » System Administration » System Security » Print User Effective Rights Report	Administration » Review » Users » Effective User Rights Report
Print User Report	Others » System Administration » System Security » Print User Report	Administration » Review » Users » User Report
Print User Group Rights Report	Others » System Administration » System Security » Print User Group Rights Report	Administration » Review » Users » User Group Rights Report
View Costpoint License Information	From the "Help" menu, select "About Costpoint"	Administration » Review » Licenses » Costpoint License Information

Job Management

Job Management Codes

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Job Management » Job Management Codes	Client/Server	Web
Manage Job Groups	Others » Process Management » Design » Maintain Process Groups	Administration » Maintain » Job Management » Job Groups
Manage Jobs	Others » Process Management » Design » Maintain Processes	Administration » Maintain » Job Management » Jobs
Manage Job Queues	Others » Process Management » Setup » Maintain Queues	Administration » Maintain » Job Management » Job Queues

Job Management Processing

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Job Management » Job Management Processing	Client/Server	Web
Start/Stop Job Server	Others » Process Management » Manage » Change Server Status	Administration » Transactions » Job Management » Start/Stop Job Server
Submit Job to Queue	Others » Process Management » Initiate » Submit Process to Queue	Administration » Transactions » Job Management » Submit Job to Queue
Update Job Queue Status	Not in Costpoint Client/Server	Administration » Transactions » Job Management » Update Job Queue List Status

Update Job Status	Others » Process Management » Manage » Change/Monitor Process Status	Administration » Transactions » Job Management » Monitor Job Status
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Job Management Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Job Management » Job Management Reports/Inquiries	Client/Server	Web
Print Job Report	Others » Process Management » Design » Print Process Report	Administration » Review » Job Management » Job Report
View Action and Report Status	Not in Costpoint Client/Server	Administration » Review » Job Management » Process and Report Status Inquiry

Job Management Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Job Management » Job Management Utilities	Client/Server	Web
Print/Purge Job History	Others » Process Management » Manage » Print/Purge Process History	Administration » Utilities » Job Management » Print/Purge Job History

Job Management Controls

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Job Management » Job Management Controls	Client/Server	Web
Configure Application Batch Job Settings	Not in Costpoint Client/Server	Administration » Maintain » Job Management » Application Batch Job Rules

Workflow

Workflow Models

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Workflow » Workflow Models	Client/Server	Web
Manage Workflow Case Labels	Others » Workflow » Design » Define Case Labels	Not in Costpoint Web
Manage Workflow Roles	Others » Workflow » Design » Define Roles	Administration » Maintain » Workflow » Workflow Roles
Manage Workflow Role Filters	Others » Workflow » Design » Define Role Filtering	Not in Costpoint Web
Manage Workflow Models	Others » Workflow » Design » Define Workflow Models	Not in Costpoint Web
Print Workflow Definition Report	Others » Workflow » Design » Print Workflow Definition Report	Not in Costpoint Web

Workflow Cases

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Workflow » Workflow Cases	Client/Server	Web
Manage Workflow Cases	Others » Workflow » Monitor » Maintain Case	Administration » Transactions » Workflow » Edit Workflow Case
Monitor Workflow Status	Others » Workflow » Monitor » Monitor Status	Administration » Transactions » Workflow » Monitor Workflow Status

Monitor Activities and Messages	Others » Workflow » Monitor » Activity and Message Inboxes	Administration » Transactions » Workflow » Workflow Activity and Message Inboxes
Escalate Workflow Activities	Others » Workflow » Monitor » Escalate Activities	Not in Costpoint Web
Print Workflow Status Report	Others » Workflow » Monitor » Print Workflow Status Report	Not in Costpoint Web


Workflow Reports/Inquiries

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Workflow » Workflow Reports/Inquiries	Client/Server	Web
Print Workflow Audit Report	Others » Workflow » Monitor » Print Audit Report	Not in Costpoint Web
View Workflow Audit Information	Others » Workflow » Monitor » Audit Inquiry	Not in Costpoint Web

Administrative Utilities

Costpoint 7.1 Menu Location	Costpoint 6.1 Menu Locations	
Administration » Workflow » Administrative Utilities	Client/Server	Web
Rebuild Workflow Data	Others » Workflow » Utilities » Miscellaneous Toolkits » Upgrade Clean-up*	Not in Costpoint Web
Import Predefined Workflows	Others » Workflow » Utilities » Miscellaneous Toolkits » Upload Predefined Workflows*	Not in Costpoint Web
Purge Workflow Data	Others » Workflow » Conclude » Purge Historical Data	Not in Costpoint Web

* The functions formerly available in the Miscellaneous Toolkits screen have been broken out into standalone applications in Costpoint 7.



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