Deltek

Costpoint Getting Started and Basic Functions Help

This edition published .

Contents

Getting Started

Welcome to Deltek Costpoint, the industry-leading, integrated software solution for project-oriented enterprises.

This online help provides instructions for accessing Costpoint's applications as well as descriptions of menus, toolbars, and other global features. You will also find information on logging on to Costpoint, accessing the database, printing reports, reviewing online help, and contacting Deltek Customer Care and other client services.

> **Attention:** If you use Internet Explorer and the Costpoint Help does not display correctly, you need to turn off Compatibility View for the browser. Click **Tools** » **Compatibility View settings**, and clear the **Display intranet sites in Compatibility View** check box. Then refresh the browser. Make sure you remove deltek.com (if listed) from the Web sites you have added to Compatibility View list.

Continuous Delivery Model

Costpoint 7.1.1, Budgeting and Planning 7.0, and Time and Expense 10.0 have moved to a "Continuous Delivery Model" where new features and enhancements are released incrementally on top of the existing versions without requiring customers to upgrade to a major, minor, or maintenance release as often.

New enhancements will be made available through DSM after development and testing are complete. These software changes can be applied the same way that hot fixes, regulatory updates, and cumulative updates are currently applied, through a combination of system jar and application level changes. Some features may require a new license, some may be enabled through a control/configuration setting, and others such as an increase to a field size in the database will be immediately enabled once the changes are applied.

Although each enhancement includes release notes, the online help is only periodically updated to reflect these changes. If you use hosted help, you will see these changes as they become available. If you do not use hosted help, we recommend that you install periodic help updates. These updates are also available from DSM. You will receive an alert when a new help installer is available.

> **Attention:** For more information on the Costpoint Continuous Delivery model you may refer to KB article # 81289, or also see DeltekCostpoint711ContinuousDeliveryModelWhitePaper.pdf, available from DSM.

Documentation Feedback

We at Deltek are always striving to improve your experience with our products. As such, we welcome any feedback regarding this online help system.

Please email any questions, issues, or comments to:

DeltekHelpFeedback@deltek.com

Videos and Learning Aids

Deltek has created several short "How to" videos and learning aids to assist you as you work with Costpoint, Budgeting & Planning, and Time & Expense. We will continue to add to the video and learning aid collection and update this listing.

All Videos and Learning Aids

Use these videos, quick reference cards, click-thrus, and Deltek University clickguides to assist you as you work with Costpoint 711.

Costpoint Learning Aids

Type	Item
Videos	**General Costpoint Usage** ▪ Access Release Notes ▪ Introducing the New Costpoint User Interface ▪ Navigating Costpoint **Employee Self Service (ESS)** ▪ Benefits Enrollment **Reports & Analytics** ▪ Home Dashboard ▪ Project Manager Dashboard **Contract Management** ▪ Contract Management Overview **Administration** ▪ Design Approval Workflow Model ▪ Using the Word Template Add In **Planning** ▪ Deltek University Planning Videos The information described in these videos is current. However, they do not reflect the recent updates to the Costpoint user interface. Additionally, the menus and navigation do not reflect the new Planning Domain, where all of the Budgeting & Planning applications are now located.
Costpoint Quick Reference \Cards (QRCs)	**General Usage** ▪ DeltekCostpoint711QueryandLookupQRC ▪ DeltekCostpoint711ViewsQRC

Type	Item
	▪ DeltekCostpoint711SettingUpPrintersQRC ▪ DeltekCostpoint711ShortcutKeysToolbarIconsAndButtonsQRC
Click-Thrus	**General Costpoint Usage** ▪ DeltekCostpoint711UserInterfaceClickThru **Contract Management Click-thrus** ▪ Contracts Overview Click-thru ▪ Customer, Vendor, and Employee Overview Click-thru ▪ Contract Management to GovWin IQ Integration Overview Click-thru ▪ Opportunities Overview Click-thru ▪ Org Conflict of Interest Overview Click-thru ▪ Subcontracts Overview Click-Thru
Deltek University Clickguides	Deltek University offers the following materials to all users - DLZ and non-DLZ subscribers. **To Access:** 1. Access the Deltek Learning Zone. 2. For non-DLZ Subscribers, click **Click Here** beneath Costpoint New User Interface Training to access free materials. Select any of the following. ▪ Costpoint New User Interface Menu Mapping Classic to New UI Clickguide ▪ Costpoint New User Interface Guided Tour ▪ Budgeting and Planning by Resource Clickguide ▪ Contract Management Clickguide ▪ Contract Management: Data Flow Between Modules *DLZ subscribers can view all other Costpoint-related training materials by selecting the Costpoint option on the DLZ landing page.*

Time and Expense Learning Aids

Type	Item
Videos	Deltek University offers the following materials to all users - DLZ and non-DLZ subscribers. **To Access:** 1. Access the Deltek Learning Zone. 2. For non-DLZ Subscribers, click Click Here beneath the Time and Expense option on the bottom right of the DLZ landing page. Select either of the following. ▪ Costpoint Time and Expense 10: Administrator and Manager Training ▪ Costpoint Time and Expense 10: Desktop User Training *DLZ subscribers can view all Costpoint-related training materials by selecting the Costpoint option on the DLZ landing page.* **Costpoint Mobile Time** ▪ Managing Time Entries
Costpoint Quick Reference Guides (QRCs)	None right now.
Click-Thrus	None right now.
Deltek University Clickguides	None right now.

Costpoint Enterprise Reporting (CER) Learning Aids

Type	Item
Videos	▪ Costpoint Enterprise Reporting Navigation Modify Reports
Checklists	▪ Costpoint Enterprise Reporting Series: Cloud Setup - Checklist ▪ Costpoint Enterprise Reporting Series: Security Setup - Checklist
Click-Thrus	▪ DeltekCostpointEnterpriseReporting721OverviewClick Thru ▪ DeltekCostpointEnterpriseReporting721DeltekModels Overview

Type	Item
Clickguides	▪ CER Managing the Company Content Folder ▪ Leveraging the CER Consumer Group
Quick Reference Guides	▪ Administrator Series: User Account Setup/Verification ▪ Administrator Series: Validation and Testing ▪ Administrator Series: Security Setup ▪ Administrator Series: Set Up Current Reporting Period ▪ Administrator Series: Move Custom Reports from Cognos 10 and Move Reports to Cognos 11
Self-Paced Learning	▪ Interactive Report Writer Series: Dashboards ▪ Administrator Series: Security Setup

Costpoint Videos and Learning Aids

The following are the Costpoint-specific videos, quick reference cards, and click-thrus.

Videos	Quick Reference Cards	Click-Thrus / Clickguides
General Costpoint Usage ▪ Access Release Notes ▪ Introducing the New Costpoint User Interface ▪ Navigating Costpoint Employee Self Service (ESS) ▪ Benefits Enrollment Reports & Analytics ▪ Home Dashboard ▪ Project Manager Dashboard Contract Management ▪ Contract Management Overview Administration ▪ Design Approval Workflow Model Planning	General Costpoint Usage ▪ Query and Lookup QRC ▪ Views QRC ▪ Setting Up Printers QRC ▪ Shortcut Keys Toolbar Icons and Buttons QRC	General Costpoint Usage ▪ User Interface Click-thru Contract Management ▪ Contracts Overview Click-thru ▪ Customer, Vendor, and Employee Overview Click-thru ▪ Contract Management to GovWin IQ Integration Overview Click-thru ▪ Opportunities Overview Click-thru ▪ Org Conflict of Interest Overview Click-thru ▪ Subcontracts Overview Click-Thru

Videos	Quick Reference Cards	Click-Thrus / Clickguides
Deltek University Planning Videos The information described in these videos is current. However, they do not reflect the recent updates to the Costpoint user interface. Additionally, the menus and navigation do not reflect the new Planning Domain, where all of the Budgeting & Planning applications are now located.		▪ Contract Management Clickguide ▪ Contract Management: Data Flow Between Modulesl Materials DeltekCostpoint711OrganizationSecurityOverview

Costpoint Enterprise Reporting Videos and Learning Aids

The following are the available Costpoint Enterprise Reporting (CER) videos and click-thrus.

Type	Item
Videos	▪ Costpoint Enterprise Reporting Navigation Modify Reports
Checklists	▪ Costpoint Enterprise Reporting Series: Cloud Setup - Checklist ▪ Costpoint Enterprise Reporting Series: Security Setup - Checklist
Click-Thrus	▪ DeltekCostpointEnterpriseReporting721OverviewClickThru ▪ DeltekCostpointEnterpriseReporting721DeltekModelsOverview
Clickguides	▪ CER Managing the Company Content Folder ▪ Leveraging the CER Consumer Group
Quick Reference Guides	▪ Administrator Series: User Account Setup/Verification ▪ Administrator Series: Validation and Testing ▪ Administrator Series: Security Setup ▪ Administrator Series: Set Up Current Reporting Period ▪ Administrator Series: Move Custom Reports from Cognos 10 and Move Reports to Cognos 11
Self-Paced Learning	▪ Interactive Report Writer Series: Dashboards ▪ Administrator Series: Security Setup

The Deltek University Learning Zone (DLZ)

Deltek University's Deltek Learning Zone contains training information for all Deltek products.

Click the link below to access the Deltek University Learning Zone (DLZ).

DLZ Free Training

If you are not a current subscriber to the DLZ, you can still view certain data as a generic user. Scroll to the bottom of the DLZ Welcome page to view current free offerings.

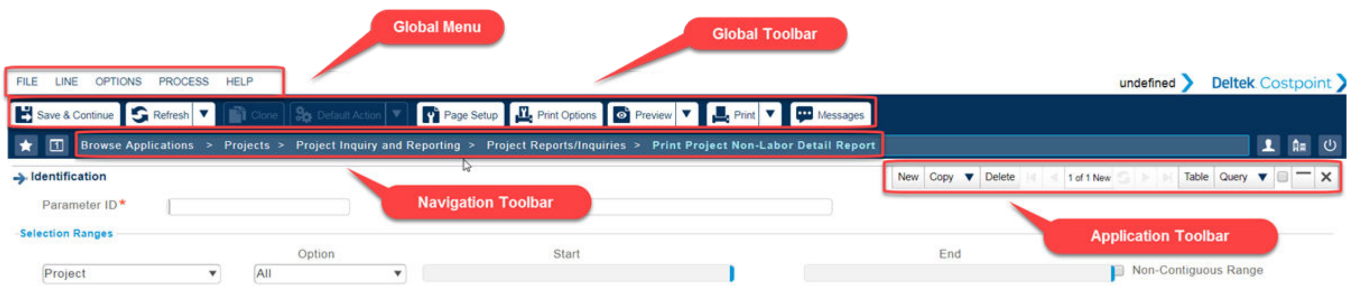
User Interface

User Interface Overview

The user interface is designed to optimize user navigation. Global toolbars and menus provide easy access to commonly used functions, while the major programs areas, organized under five domains, display below. The following images provide overviews of the major features of the user interface.

Global Toolbars and Menu

The user interface provides you with several convenient menus and toolbars, always available and accessible, so you can carry out your tasks quickly and efficiently.



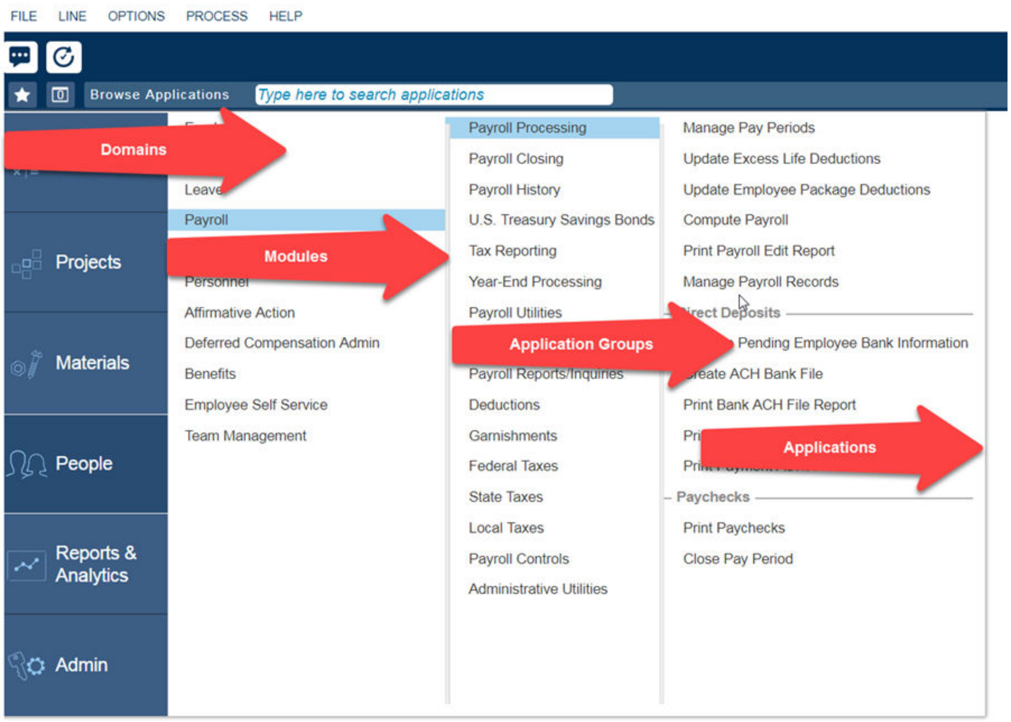
- **Global Menu**: These menu options are always available and provide quick access to frequently used features.
- **Global Toolbar**: These toolbar options are always available and you can configure both display and content.
- **Navigation Toolbar**: This toolbar enables easy navigation and includes a "bread crumb" trail that displays your present location.
- **Application Toolbar**: This toolbar displays in every application. Use it to open new records, make queries, and other tasks.

Domains and Applications

Domains display in the stacked list on the left side of the screen. The contents of these domains are organized in the three panes located next to the Domain list, "drilling down" as you proceed rightward. Proceeding from left to right, these panes display:

- The available modules for the selected domain

- The application groups for the selected module
- The applications within the selected application group



- **Domains**: This column displays Costpoint domains, and also displays other purchased products. In this example, the Costpoint People domain is selected.
- **Modules**: This pane displays modules that belong to the selected domain. In this example, all modules that belong to the Costpoint People domain display.
- **Application Groups**: This pane displays application groups for the selected module. In this example, the pane displays application groups for the Payroll module.
- **Applications**: This pane displays applications for the selected application group, in this case the Payroll Processing group.

> **Note:** Use the Configure System Settings screen to change the background color of the user interface per company/system. This is useful if you have multiple companies (or systems) and color recognition can help you differentiate one company/system from another. The background color can only be changed per company/system and not per user.

Costpoint My Menu

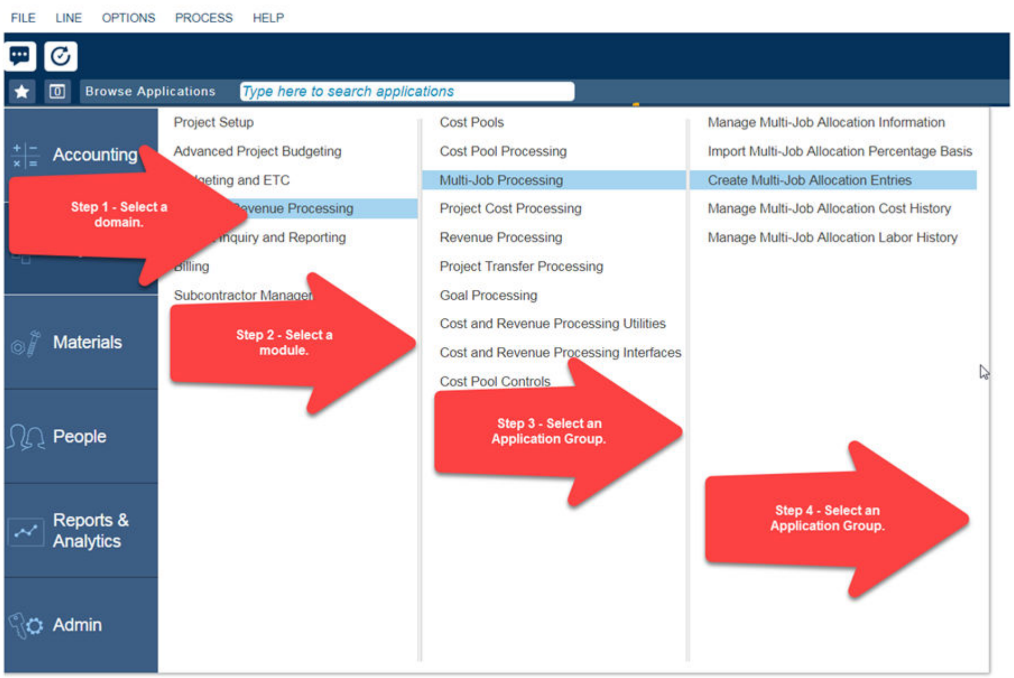
- To open the My Menu screen, click .
- To customize this menu, click **Manage My Menu** found at the bottom to open the Configure User Preferences screen.

Attention: For details, please see the documentation for the Configure User Preferences screen.

Navigating the User Interface

The user interface is organized into program areas or domains. The Navigation screen displays these domains in the stack on the left side. These domains are further categorized in a series of three panes. Starting from left to right, you can navigate from the highest-level program domain down to the desired application.

You can access the Navigation screen at any time by clicking **Browse Applications** on the Navigation Toolbar.



To navigate the Costpoint User Interface:

1. **Select a Costpoint Domain or product**: Click a domain to display its modules on the next pane.
2. **Select a module**: Click a module to display its application groups on the middle pane.
3. **Select an application group**: Click an application group to display its applications on the right-hand pane.
4. **Select an application**: Click an application to open it. For example, click **Create Multi-Job Allocation Entries** to open that application.

Note: You only see those domains, modules, and applications to which you have access rights. If you have questions concerning access/permissions, please contact your administrator.

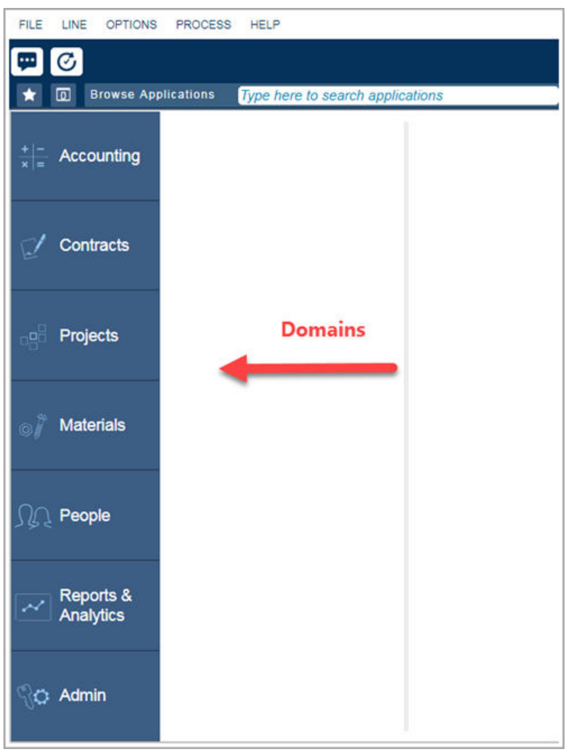
Costpoint Domains or Products

Data comprising Deltek Costpoint are categorized into domains.

Domains represent the top level of the Costpoint hierarchy and always display in a stack on the left side of the Costpoint Navigation screen. When you click a domain, the modules for that domain display in the first pane to the immediate right of the domain list.

There are six domains in Costpoint:

- Accounting
- Contracts
- Projects
- People
- Materials
- Administration
- Reports & Analytics

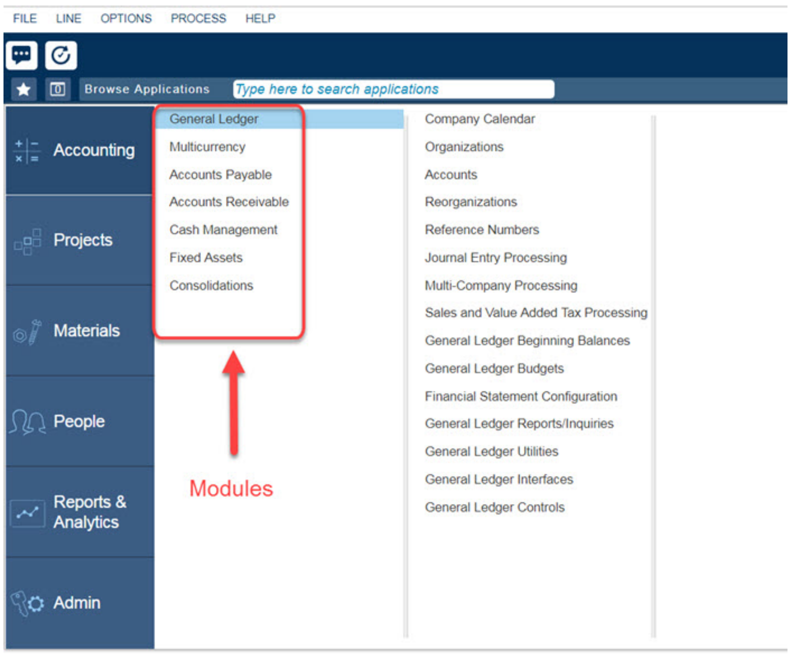


Deltek Costpoint is organized by domains as displayed in the above pane. To view the various modules that comprise a specific domain, click the domain.

If you purchased other products, additional options appear (for example, Time & Expense or Budgeting & Planning).

Modules

Each domain is subdivided into modules, which are displayed on the left pane next to the domain list. When you select a module, the list of application groups displays on the second pane.

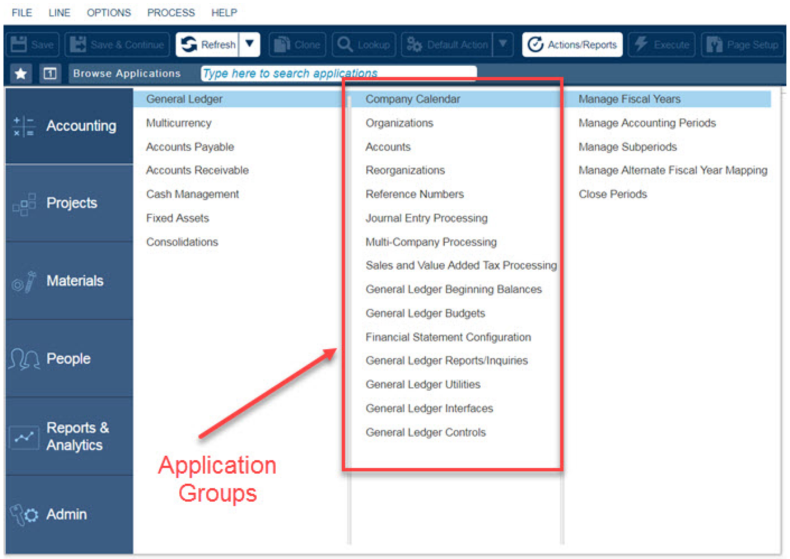


In the example above, when the **General Ledger** module is selected from the left-hand pane, the **General Ledger** application groups (for example, **Company Calendar**, **Organizations**, **Accounts**) display in the next pane immediately to its right.

Application Groups

Under some modules are application groups that display in the middle pane when a specific module is selected. Note that not all modules have application groups contained in them.

When you click an application group, the list of applications that belong to that group displays on the next pane on the right.



In the example above, when the **Company Calendar** group is selected, applications that belong to that group (for example, **Manage Fiscal Years**, **Manage Accounting Periods**, **Manage Subperiods**, **Manage Alternate Fiscal Year Mapping**, and **Close Periods**) display on the right-hand pane.

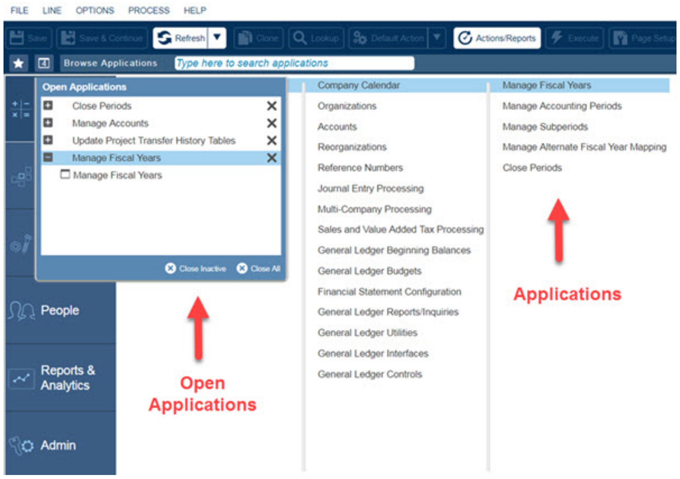
Applications

Applications reside in the deepest level of the hierarchy, and they are represented as separate screens.

You can work in separate application screens to carry out a wide variety of tasks, such as:

- Entering data for vouchers, purchase and manufacturing orders, and contracts
- Viewing and editing existing payroll records
- Creating and reviewing various labor, accounts payable, and inventory reports
- Printing and posting reports and checks

Note: The above list represents only a small number of available functions.



There are three convenient methods for accessing applications and navigating between them:

- Using the **Navigation** screen. You can access and open applications by drilling down to the appropriate location through the Module/Application Groups/Applications panes.
- Using the **Navigation Toolbar**. After you open more than one application, you can click (**Open Applications**) from the Navigation Toolbar to select which open application you want to work with. The Open Applications dialog box is also a convenient way to close applications without having to display them directly.
- The numeral that displays in the Open Applications icon changes depending on the number of applications that are open. Click it to display the Open Applications dialog box. The image below displays the Open Applications dialog box, which opens as a drop-down when you click the icon.
- Using the **Search** feature. Learn more about accessing an application using the Search feature.

In the **Application** field on the Costpoint Login screen, you can specify the application (through its application ID) that you would like to display by default when you open Costpoint.

Many applications are organized by task type (for example, reports and inquiries are grouped together in the application list) or topic (for example, W-2s, Electronic Filing, and State and Local Taxes).

Global Menus and Toolbars

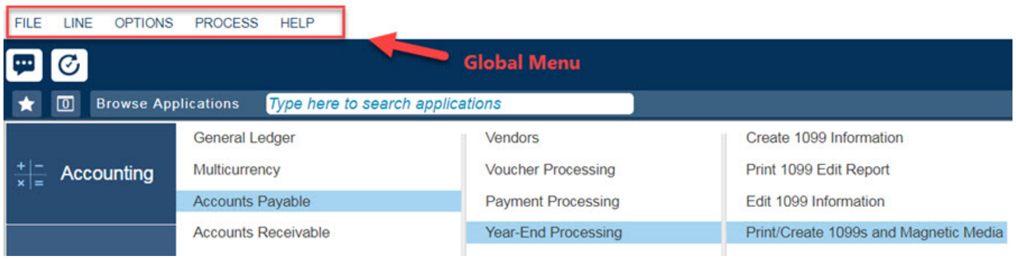
Global Menus

Global Menu

The Deltek Global Menu provides easy access to commonly used functions, so you can carry out your tasks quickly and efficiently.

Each menu item drills down to reveal options that are applicable to an open application/task or active window. Menu options are presented in two colors:

- **Gray**: Indicates that the option is inactive or is not available for that particular application or active window.
- **Black**: Indicates that the option is active or available for that particular application or active window.



The following menu items are available in the Global Menu:

- **FILE**: Contains options to manipulate database tables and records, including creating new records, saving and deleting them, and logging out.
- **LINE**: Contains options to add, delete/undelete, copy, or toggle between lines/selections. Line menu options are only available at the table window level.
- **OPTIONS**: Contains options to select company data, search for data and records, navigate through records, and modify user preferences.
- **PROCESS**: Contains options to upload and download files as well as select default actions related to the current application.
- **WORKFLOW**: Contains options to quickly access several common Workflow functions, such as sending an email notification that the user has completed a task using the current application.
- **HELP**: Displays online help for a currently displayed function.

Global File Menu

The Global File Menu contains items to manipulate database tables and records, including creating new records, saving and deleting them, and logging out.

The table below describes Global File Menu functions, including available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

Menu Option	Function
Execute (F3)	Select this option to populate the table window. Costpoint uses the filtering conditions you entered on the top screen. If you have not yet entered data (for example, when you have just opened the application), you can click **Execute** to retrieve all available database rows permitted by the business rules. Click to launch **Execute** from the Global Toolbar.

Menu Option	Function
Clone Record (F4)	Click **Clone Record** to create a new record that retains information from an existing record. After you create a new record by cloning an existing record, you can edit the data in the new record. Use the **Toggle View** option on the Application Toolbar to switch back and forth between the new record and the existing record. **Clone** is not available for all functions.
Save (F5)	Select this option to save your data to the database. Click to use this feature from the Global Toolbar.
Save & Continue (F6)	This menu option saves your input without clearing the screen, which allows you to continue working on the current record. Click to use this feature from the Global Toolbar.

Refresh	Select this item to display a submenu with four Refresh options. These options allow you to refresh all or part of an application. Generally, refreshing an application returns it to the state it was in when you opened it, reversing any changes you have made to records on the screen and restoring those records to the state they were in when you first loaded them from the database.
	▪ **Clear All**: Use this option to do the following:
	  ▪ Cancel all edits you made since opening the application, and
	  ▪ Restart the application.
	Costpoint deletes all the changes you made to your queried data since opening the application and then restarts your session.

<table>
<tr><th>Menu Option</th><th>Function</th></tr>
<tr><td></td><td>

Refresh All: Use this option to do the following:

Cancel all edits made in the current application, and
Re-execute all current queries for all currently opened screens within the application.

Costpoint only re-executes a query if you previously executed one in the current session.
Refresh Subtask: Use this option to refresh the current subtask. Costpoint deletes all edits for a single document that you have made both under that subtask and its subordinate subtasks, if any. Data on the header record and on other subtasks do not refresh. This option is available only within a subtask.
Refresh Document: Use this option to refresh the currently selected document. Costpoint refreshes the data on the current header row and all its supporting details. Costpoint removes all previous edits. This option applies to documents (header records) only. You cannot refresh a new row since it does not yet exist in database.
This option enables only for the top level, at the root of the document. This option is disabled for subtasks.

Click  to open this feature from Global Toolbar.
</td></tr>
<tr><td>Print Options (CTRL+ALT+P)</td><td>Select this item to display the Print Options dialog box, where you can review and modify your printer options. Choose the destination for your output (for instance, system or local printer, file, email, download, or archive), select specific pages for printing, number of copies, and more.

Click  to open this feature from the Global Toolbar.</td></tr>
</table>

Menu Option	Function
Page Setup	Select this item to display the Page Setup dialog box, where you can specify your report's layout. You can choose the font, layout (landscape or portrait), paper size, margins, and whether to include your company logo and name. Click to open this feature from the Global Toolbar.
Preview Default Report (CTRL+SHIFT+V)	Select this item to display a preview of the current report. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode. For most non-report applications, three options are available to print the records: ▪ Current Record Information - Vertical Layout ▪ Current Record Information - Horizontal Layout ▪ Queried Records Information - Horizontal Layout Click to open this feature from the Global Toolbar.
Print Default Report (CTRL+SHIFT+P)	Select this item to print the current report. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode. For most non-report applications, three options are available to print the records: ▪ Current Record Information - Vertical Layout ▪ Current Record Information - Horizontal Layout ▪ Queried Records Information - Horizontal Layout

Menu Option	Function
	Click to open this feature from the Global Toolbar.
Export to Excel (CTRL+SHIFT+E)	Select this item to export the current report to Microsoft Excel. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes, except the report output is automatically set to Excel format.
Close Application (CTRL+W)	Select **Close** to exit the current Costpoint application. When you click **Close Application** from the Global Menu, Navigation Menu (in Open Applications) or Application Toolbar will not exit Costpoint. Click to close the current application from the Application Toolbar.
Log Out (CTRL+SHIFT+F12)	Select this option to exit Costpoint, including all currently active Costpoint applications. If you have unsaved changes, you will have the opportunity to cancel and save your new data before you exit Costpoint. Click to log out of Costpoint from the Navigation Toolbar.

Global Line Menu

The Global Line Menu contains options to add, delete, and undelete lines. Options under the Line menu are only available at the table window level. If the options are not available, it is usually because no table window is present on the screen.

The table below describes Global Line Menu functions for Costpoint and includes available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

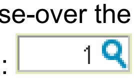
Menu Option	Function
New Record (F2)	Select **New Record** from the Line menu to create a new line at the end of a table window for input of new data. Use this function when beginning work with any table window. Most transaction screens require this to begin the "line" portion of the input. Click New to open this feature from the Application Toolbar.
Copy Record (CTRL+E)	Select **Copy Record** to duplicate a line.

Menu Option	Function
Copy Data to Insert into Excel	Select this option to copy the line to Microsoft Excel.
Copy Data to Paste into New Record(s)	Select this option to copy the line as another parent record.
Paste Data	Select this option if you just copied a line and want to paste it as a new line.
Delete Record (CTRL+DEL)	Select **Delete Record** from the Line menu to designate deletion of a specified line of data from a table window. An displays in this box and indicates that the next time you save your data, the row will be deleted. Click Delete to use this feature from the Application Toolbar.
Undelete Record (CTRL+DEL)	Select **Undelete Record** from the Line menu to reverse the previous menu option. For example, with table window lines, you can remove the designation for deleting a particular line. This removes the from the far left column. Click Undelete to use this feature from the Application Toolbar. Note that the **Undelete Record** option appears only when an actual record has been deleted.
Toggle Row Selection (SHIFT+F7)	Use this option to select or deselect a row on an active screen.
Force Object Validation (CTRL+ALT+V)	Use this option to validate the current field. Costpoint validates data for business logic at either the server or browser level, depending on the complexity of the calculation. This option is necessary only in Record and Application validation frequency modes.
Force Line Validation (ALT+SHIFT+V)	Use this option to validate the current record. Costpoint validates data for business logic at either the server or browser level, depending on the complexity of the calculation. This option is necessary only for the Application validation frequency mode.

Global Options Menu

The Global Options Menu contains items to select company data, search for data and records, navigate through records, and modify user preferences.

The table below describes the functions, including available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

Menu Option	Function
Select Company	Select this item to display the Select Company dialog box. The drop-down list displays available companies. Choose a different company from the list and click **Change Company**. To change companies, you must close all open applications for the active company before you can switch to another company. If applications are open, click **Close Applications** to close them or click **View Applications** to identify the open applications and then close them. Click  to open this feature from the Navigation Toolbar.
Lookup (F10)	Select this feature to look up and select available values in cases where you are unsure of the ID or code you need to complete a particular field. The Lookup dialog box displays a table containing the values that are available for entry into a specific screen field. You can either scroll through the displayed values or look up a specific value. When you select a value in Lookup, Costpoint transfers that value to the field from which you launched Lookup. If you place your cursor in a character field (non-numeric and non-date), you can enter the first few letters of the data you are looking for and Costpoint will automatically filter using this data. Certain fields also contain the Lookup feature. These fields display a thick blue line on the right side: . Mouse-over the blue line to display the Lookup icon: . To display the Lookup dialog, click the Lookup icon or press F10 on your keyboard.

Menu Option	Function
	Note that **Query** is also available from Lookup. When unavailable, the Lookup toolbar icon is shaded. Click to access **Lookup** from the Global Toolbar.
Query (F11)	Select **Query** to set up a data query and define parameters for your database search. The Query dialog box will appear once you click **Query**. On the Find tab, use the **Search Criteria** fields to narrow your search by specifying key words. The available fields vary depending on the type of application. On the Query tab, use the **Query Condition** fields to indicate search parameters by specifying field conditions. On the Sort tab, use the **Sort Records By** fields to specify the order in which they should be sorted. On the Saved Queries tab, you will see the previously created queries that are stored in Costpoint. You can select among the list and use it as your query. Click the **Count** button to display the number of records that the query will return based on your parameters. You can then modify your parameters to narrow your search results, if necessary. Click the **Search** button to display the result set. Under the Form View you can page through the result set records when you use the forward and buttons. Or, under Table View, highlight the row you want to review or modify. You can modify **the selected record directly from the table grid as well as launch associated functions.** Open t**he Saved Queries tab to display a list of your saved queries.** Click Query ▼ to access Query from the Application Toolbar.
First (CTRL+UP ARROW)	Click **First** to call up the first row in the Query result set and make it available for review or

Menu Option	Function
	editing. This item disables and is shaded if the current row is actually the first row in the result set. Click  to access the **First** record from the Application Toolbar.
Previous (CTRL+LEFT ARROW)	Click **Previous** to call up the row immediately previous to the currently active row in the Query result set and make it available for review or editing. This function disables if the current row is the first row in the result set. Click  to access the **Previous** record from the Application Toolbar.
Next (CTRL+RIGHT ARROW)	Click **Next** to bring up the row immediately following the currently active row in the Query result set and make it available for review or editing. This function disables if the current row is the last row in the result set. Click  to access the **Next** record from the Application Toolbar.
Last (CTRL+DOWN ARROW)	Click **Last** to bring up the last row in the Query result set and make it available for review or editing. This function disables if the current row is actually the last row in the result set. Click  to access the **Last** record from the Application Toolbar.
Toggle View (ALT+CTRL+T)	After you create a new record by cloning an existing record, use this option to switch back and forth between the new record and the existing record. This is particularly useful for Form View-only screens.
Switch to Table/Form View (CTRL+M)	Click **Switch to Table View** or **Switch to Form View** to change the display format between Form View and Table View. In Table View, click Form from the Application Toolbar to switch to Form View. In Form View, click Table from the Application Toolbar to switch to Table View.
Reset Default Positioning and View (SHIFT +ALT+Z)	Use this option to return objects within an application (for instance, tables and screens) to

Menu Option	Function
	their default positions, and to return the current application to the view (Table or Form) in which it displayed when you activated it.
System Message(s)	Click **System Message(s)** to view system messages and alerts in a display box at the bottom of the screen.
Screen Configuration	Click **Screen Configuration** to modify the layout of the current application and make changes to your Navigation Toolbar and My Menu. **Application Layout Changes**: Click **Save** to retain the current application display. For example, you might want a specific subtask to automatically display every time you access a particular application. You can also save the order of the columns for a particular table. Click **Reset** to revert to the default settings for this application. **Global Toolbar Icon Options:** Click **Edit** to configure the Global Toolbar. You can rearrange the display of function icons, as well as add or remove them. You can also choose whether to display function labels for the icons. Your configurations apply for each application type. For example, if you configure the Navigation Toolbar on the Manage Project Billing Information application, that configuration will apply for all Data Entry applications in Costpoint. Click **Reset** to return the toolbar display to the default setting. **Auto Positioning On**: In the Classic view of the UI, select this check box to resize applications to fully utilize screen space. **Manage User Profiles**: Select the user profile you want to view from the list. Click **Manage Profile** to open the user profile. All applications must be closed to access User Profiles. If applications are open, click **Close Applications** to close them or click **View Applications**to identify the open applications and then close them. Click the **Configure User Preferences** link at the bottom of the window to modify the contents of My Menu in the **Configure User Preferences** screen. From the My Menu Application List in the bottom left pane, click

Menu Option	Function
	the column with the check adjacent to each application you wish to add to My Menu (CTRL +Click for multiple applications). Next, click Select. The applications you selected displays in the My Menu pane on the bottom right. Click **File** » **Save** from the Global Menu, or click from the Global Toolbar to save your preferences. Click from the Navigation Toolbar to access this feature.
User Preferences	This screen consists of areas of user preferences and information: ■ **User Information**: Review or modify your reporting company, password, default information, default delivery options, and phone. **Default Information**: Specify company information. **Password Information**: Review or modify your access password. **Default Report Delivery Options**: Select the default delivery mode for reports. Options include System Printer, Download, Email, Print to File, Local Printer, and Archive. **Phone**: Modify your phone number and extension. **Locale**: Specify default locale information. **Delegate Approvals**: Specify information on delegation of approvals. **Other Options**: Specify batch process/ report notification settings, enable autocomplete for fields, and select your preferred notification methods. **UI**: If using the Classic UI, select how application screens are displayed on your computer monitor. Auto-positioning is always on in the new UI. ■ **Change Default Period**: Click this link to display the Change Default Period

Menu Option	Function
	subtask, where you can modify the default fiscal year, period, and subperiod for the current module. These defaults are used by many transaction functions in Costpoint. - **UI Profiles**: Administrators can use this subtask to pre-configure different settings for user groups as a whole. - **My Menu Application List**: This table lists all Costpoint applications that are available for inclusion in the My Menu list. To include an application in My Menu, highlight the application (highlight multiple applications using CTRL + Click) and click the **Select** button. Costpoint moves the applications to the My Menu list. - **My Menu**: My Menu provides convenient access to your favorite applications. Provided that you have authorization, you can modify your My Menu settings here. Click  to access My Menu from the Navigation Toolbar. - **Default My Menu**: Click this link to display the Default My Menu subtask, where you can set up customized My Menus for specific users.
Arrange Table Columns	Select this menu item to open the Arrange Table Column dialog box, where you can **Move Up** or **Move Down** a specified column. Enter the number of columns you will lock when you scroll to the right in the **Locked columns on left side** field. Click **Apply** to save changes, and click **Close** to exit the dialog box. To make changes permanent, save the Application Layout after clicking **Apply**.
Show/Hide Screen Controls	Click this menu item to display the Show/Hide Screen Controls dialog box, where you can choose to display or hide screen controls such as input text fields, check boxes, combo boxes, radio buttons, group boxes, labels, screen

Menu Option	Function
	tabs, subtask links, table/form, query, and records selected. You can also right-click on a field or screen control name and then click **Show/Hide Screen Controls** to display the dialog box. On the dialog box, click **Data Fields**, **UI Controls**, or **Toolbar Controls** to see the options available. Select the **Always Hide** check box next to the item(s) you want to hide, and then click **Apply**. Costpoint automatically hides the selected item(s) in Form and Table views. Click **Close** to exit the dialog box. To make changes permanent, save the Application Layout after clicking **Apply**. To display hidden fields, open the dialog box, clear the **Always Hide** check box, click **Apply**, and save the Application Layout.
Show/Hide Messages & Errors (SHIFT+F3)	Click this menu item to display or hide the Messages & Errors window at the bottom of the Navigation screen. This window is hidden by default. It normally displays in the following two situations: ▪ When the user's actions within an application trigger a warning, error, or status notification. ▪ When the user manually selects the **Show/Hide Messages & Errors** option from with the Global Options Menu or the Global Toolbar. Click  from the Global Toolbar to display the Messages and Errors window. Click  from the Global Toolbar to hide the Messages and Errors window.
Next Application (CTRL+J)	Click **Next Application** to shift the display to the next open application. Costpoint shifts through the active applications in the order you opened them. This menu option is disabled if you have only one active application.
Next Window (CTRL+B)	Select **Next Window** to shift the display to the next window within the application.

Menu Option	Function
Next Tab (CTRL+TAB)	Select this menu item to display the next tab for the current application. The tab order moves from left to right.
Attached Documents	Select this menu item to open a subtask that displays attached documents from Content Management system.
Attached Emails	Select this menu item to open a subtask that displays attached emails from Content Management system.

Global Process Menu

The Global Process Menu contains options to upload and download files as well as select default actions related to the current application

The table below describes Costpoint Global Process Menu functions, including available shortcut keystrokes. Note that not all menu and toolbar functions are available for all features.

Menu Option	Function
Action Menu	Click **Action Menu** to display a submenu of available actions that you can launch for the current application.
Default Action (CTRL+SHIFT+R)	Click **Default Action** to launch the default action in the current result set. For example, when running an import screen, click this option to initiate the import process. Click  to launch the default action from the Global Toolbar menu. This icon may include a drop-down list  that offers access to available actions for the current result set. The first item in the list is the default action.
View Action and Report Status	Click **View Action and Report Status** to launch a screen that helps monitor the overall workload on the job server and view the status details of the jobs being processed.
File Upload	Click **File Upload** to display the File Upload Manager, where you can specify the path for documents that reside on a different network. Not all file types and sizes are eligible for upload.
File Download	Click **File Download** to display a dialog box where you can select data files for download,

Menu Option	Function
	including files from Deltek Time & Expense and Magnetic Media files. You can also use **Query** to find files for downloading.

Global Workflow Menu

Global Workflow Menu provides quick access to some common Workflow functions, such as sending email notification that the user has completed a task using the current application.

The table below describes Costpoint Global Workflow Menu functions. Note that not all menu and toolbar functions are available for all features. Unavailable functions are shaded.

Menu Option	Function
Workflow	Select this option to perform any of the following actions: ▪ **Re-Send Email**: Select this option to route workflow activities and messages through email. ▪ **Activity Instructions**: Select this option to view workflow cases, labels, and values, as well as activity instructions using the Activity Instructions screen. ▪ **Complete Activity**: Select this option to complete a workflow activity. **Attention:** See **Administration » Workflow » Workflow Cases » Monitor Activities and Messages** in the online help for more information.

Global Help Menu

The online help function is easily accessible when you click **Help** on the Global Menu.

When you click Help » Help for a currently displayed application or screen, the online help for that particular application displays. If the current screen is a subtask, the online help for the main screen displays. If there is no active screen, the Table of Contents and welcome screen display.

The table below describes Global Help Menu functions. Note that not all menu and toolbar functions are available for all features.

Help Menu	Function
Help (SHIFT+F1)	This option displays the Table of Contents for the complete Help.

Help Menu	Function
	You can either access the Help using the Local version which is embedded in the software during installation or you can use the Hosted Help version which can be accessed through the Web and is updated periodically. Users do need Internet access to use the hosted help. When you click Shift+F1 or HELP » Help, the appropriate help topic displays regardless if you are using hosted or local help. Costpoint is configured to use local help by default. To change this, select Use Hosted Online Help on the Logging tab in the Configuration Utility. To ensure that you always have the most current version of the help, Deltek strongly recommends using hosted help. Otherwise, you will need to download help updates periodically from DSM.
About	The View Help About screen provides information about your Costpoint system, displayed in the following sections: ▪ **General Information**: This section displays the version number for the current version of Costpoint, Budgeting & Planning, and/or Time & Expense, plus System, Company, and Validation Frequency information. ▪ **Open Applications**: Click this subtask link to view a table that lists currently active applications, their application IDs, and screen customization and extensibility unit status. ▪ **Transactional DB Patches**: Click this subtask link to display a table list of transactional database patches for the current version of Costpoint. The table includes information on version numbers and the dates on which the patches were applied. ▪ **Administrative DB Patches**: Click this subtask link to display a table list of administrative database patches for the

Help Menu	Function
	current version of Costpoint. The table includes information on version numbers and the dates on which the patches were applied. ▪ **Metadata DB Patches**: Click this subtask link to display a table list of metadata database patches for the current version of Costpoint. The table includes information on version numbers and the dates on which the patches were applied. ▪ **Budgeting & Planning DB Patches**: Click this subtask link to display a table list of database patches for the current version of Budgeting & Planning. The table includes information on version numbers and the dates on which the patches were applied. This subtask is available only when Budgeting & Planning is deployed in the system you are using. ▪ **Time & Expense DB Patches**: Click this subtask link to display a table list of database patches for the current version of Time & Expense. The table includes information on version numbers and the dates on which the patches were applied. This subtask is available only when Time & Expense is deployed in the system you are using. ▪ **Customized Labels**: The Customized Labels subtask displays the customized labels, if any, that have been entered on the Manage Standard Label Customizations screen. You can use the Manage Standard Label Customizations screen to change how certain standard labels display in Costpoint. For example, if you change Customer to Client, Client displays in place of Customer on screens and reports throughout Costpoint. For more information, review the documentation

Help Menu	Function
	for the Manage Standard Label Customizations screen. ▪ **Features**: Click this subtask link to view a list of features that are installed in Costpoint.
Submit Support Issues	Select this option to report any performance issue to Deltek Customer Support.

Search Help Topics

Use the Table of Contents of the Help to search terms or topics within the Help system.

To search for help topics, do the following steps:

1. Click the **Search** button to find help topics that contain specific words or phrases.
2. Click **Go** to start the search.
3. Select the **Highlight search results** check box to highlight the instances of your search keywords in the help topics.
   You can also enter the number of search results you want to display.

Procedures

Change Password

Use this feature to change your Costpoint password.

Contents
The password must contain at least eight characters.

Field	Description
Old Password	Enter your current password.
New Password	Enter your new password. Costpoint uses the following password validations: ▪ New passwords cannot be the same as the old password. ▪ New passwords must match their **Verification** entry. ▪ Passwords can contain alphanumeric characters and all special characters on the keyboard (!,#,$,%,&,(,),*,+,-,<,=,>,?,@,[,],^,_,{,},~).

Field	Description

	▪ If **Allow Reusing of Passwords** check box is clear in **Administration** » **System Administration** » **System Administration Controls** » **Configure System Settings**, the application checks the User Password History Table to determine whether the password has already been used.
	▪ The password must begin with a letter.
	▪ The password cannot contain any of the following:
	  ▪ First name
	  ▪ Last name
	  ▪ First and last name
	  ▪ User ID
	  ▪ Employee ID
	  ▪ The word "password"
	▪ The password must meet the password complexity specified in **Corporate Settings**, which you access when you go to **Administration** » **System Administration** » **System Administration Controls** » **Configure System Settings**.

Verification	Enter your new password again, exactly as it appears in the New Password field.

Change Default Period

You can use this feature to change your default fiscal year, period, and subperiod for the current module.

To access this screen, go to the **Options** » **User Preferences**. On the User Preferences screen, click the **Change Default Period** link. These items are automatically preloaded in most Costpoint transaction functions. If you enter a different timeframe on a transaction screen, you will temporarily override the module's default period until:

- You enter even another timeframe on a transaction screen
- You select this menu option and change the default period, or
- You exit Costpoint

When you bring Costpoint back up, the default period reverts to the values that you last entered on this screen.

You do not have to enter a Fiscal Year/period/subperiod combination if you prefer not to.

Contents

Field	Description
Fiscal Year	This field's Lookup has the fiscal years that are currently open (that is, fiscal years with currently open periods and subperiods). Select a fiscal year from the Lookup, or leave the field blank if the Period and Subperiod are both to remain zero.
Period	This field's Lookup has the open accounting periods that are currently open (that is, accounting periods with currently open subperiods). Select a period from the Lookup, or enter a zero if the Fiscal Year is blank.
Subperiod	This field's Lookup has the subperiods that are currently open. Select a subperiod from the list, or enter a zero if the Fiscal Year is blank.

Maintain My Menu

Use this feature to create the user's **My Menu**, which is a custom user menu.

This menu item enables if the user has been authorized to change My Menu.

Attention: See Manage Users in the online help for more information.

Global Toolbars

Global Toolbar

Global Toolbar Menu

Use the items in this menu to save work to the database, clone records, refresh the current application, manage printing tasks, and many other functions.

You can configure this toolbar for each application type. To modify the Global Toolbar, click the User Preferences icon on the right-hand side of the screen, and then select **Modify** across the **Top Level Toolbar** label. You can rearrange, remove, or add functions, and choose whether or not to display labels with the icons.

Toolbar Option	Function
Save	Click to save your data to the database.
Save & Continue	Click to save your input without clearing the screen. This allows you to continue working on the current record.
Refresh	Click to display a submenu with four **Refresh** options. These options allow you to refresh all or part of an application. As long as you have not saved your changes, refreshing

<table>
<tr><th>Toolbar Option</th><th>Function</th></tr>
<tr><td></td><td>an application returns it to the state it was in when you opened it.

Clear All - Use this option to do the following:

Cancel all edits you made since opening the application
Restart the application

Changes made to your queried data since opening the application are deleted, and your session restarted.
Refresh All: Use this option to do the following:

Cancel all edits made in the current application
Re-execute all current queries for all currently opened screens within the application. Only previously executed queries from the current session restart.

Refresh Subtask: Use this option to refresh the current subtask. This deletes all edits for a single document that you have made both under that subtask and its subordinate subtasks. Data on the header record and on other subtasks do not refresh. This option is available only within a subtask.
Refresh Document: Use this option to refresh the currently selected document. Costpoint refreshes the data on the current header row and all its supporting details. Costpoint removes all previous edits. This option applies to documents (header records) only. You cannot refresh a new row since it does not yet exist in the database.
This option enables only for the top level, at the root of the document. This option is disabled for subtasks.
</td></tr>
<tr><td>Lookup</td><td>Click  to select available values in cases where you are unsure of the ID or code you need to complete a particular field.</td></tr>
</table>

Toolbar Option	Function
Default Action	Click to launch the default action in the current result set. For example, when running an import screen, click this option to initiate the import process. This icon may include a drop-down list that offers access to available actions for the current result set. The first action in the list is the default action.
Clone	Click to create a new record containing the same information as an existing record. After you create a new record by cloning an existing record, you can edit the data in the new record. Use the Toggle New/Existing Records View option on the Application Toolbar to switch back and forth between the new record and the existing record.
View Action and Report Status	Click to launch a screen that helps monitor the overall workload on the job server and view the status details of the jobs being processed.
Execute	Click to populate the table window. Costpoint uses the filtering conditions you entered on the top screen. If you have not yet entered filtering parameters (for example, when you have just opened the application), you can click **Execute** to retrieve all available database rows permitted by the business rules.
Page Setup	Click to configure your report display options. Choose from Portrait and Landscape layouts, select margins and paper sizes, fonts, and whether to include footers and your company name and logo.
Print Options	Click to display the Print Options dialog box, where you can change your printer options. Choose the destination for your output (for instance, system or local printer, file, email, download, or archive), select specific pages for printing, number of copies, and more. See Print Options for more information.

Toolbar Option	Function
Preview	Click to display a preview of the current report. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode. For most non-report applications, three options are available to print the records: ▪ Current Record Information - Vertical Layout ▪ Current Record Information - Horizontal Layout ▪ Queried Records Information - Horizontal Layout
Print	Click to print a report using your default settings. Costpoint prints the report using the selections you made on the Page Setup and Print Options dialog boxes. Most report applications (such as the Project Status Report), include only the option to print the report. Some applications include an option to print in batch mode.
Reset Default Positioning and View	Click to return objects within an application (for instance, tables and screens) to their default positions, and to return the current application to the view (Table or Form) in which it displayed when you activated it.
Show Messages & Errors	Click on the Global toolbar to display the Message(s)/Error(s) window. Click on the Global toolbar to hide the Message(s)/Error(s) window. The Message(s)/Error(s) window is hidden by default. It normally displays in the following two situations: ▪ When the user's actions within an application trigger a warning, error, or status notification. ▪ When the user manually selects the **Show Messages & Errors** option from with the Global Options Menu or the Global Toolbar.

Toolbar Option	Function
Workflow	▪ **Re-Send Email**: Select this option to route workflow activities and messages through email. ▪ **Activity Instructions**: Select this option to view workflow cases, labels, and values, as well as activity instructions using the Activity Instructions screen. ▪ **Complete Activity**: Select this option to complete a workflow activity. **Attention:** See **Administration** » **Workflow** » **Workflow Cases** » **Monitor Activities and Messages** in the online help for more information.

Navigation Toolbar

Navigation Toolbar Menu

Use the items in this menu to select the active company, display active applications, configure your screen and application displays, and manage My Menu.

Toolbar Option	Function
Go to Home Dashboard	Click to access the Home Dashboard. The Home Dashboard displays actionable data that you access most often, including information on your timesheets, pending tasks, expense reports and authorizations, available leave balances, and outstanding expenses. This dashboard is also available from the Reports & Analytics domain. **Note:** The Home Dashboard and the icon are available and visible only to users who are licensed for Deltek Time & Expense.
My Menu	Click to access the My Menu dialog box. My Menu displays a convenient list of your most-used applications. You can easily activate an application included in My Menu by clicking its name from the My Applications list.

Toolbar Option	Function
	To modify your My Menu, click the **Manage My Menu** link at the bottom of the dialog box. For more information, see Screen Configuration under Global Options.
Open Applications	Click to display a list of currently open applications. The number in the box reflects the number of applications you currently have opened. In this example, the Open Applications icon indicates that two applications are open. Click any application on the list to display that application. indicates the application contains unsaved data. Click to close the application. To close the inactive applications or to close all the applications, click the corresponding button: Close Inactive Close All
Browse Applications	Browse Applications *Type here to search applications* Click **Browse Applications** to display the basic Domain and Application (user interface) structure. Select a Domain to view its component modules in the first column. From there, you can drill down to view a module's application groups (displayed in the second column) and, finally, the individual applications belonging to that group in the third column. Click an application to activate it. **Attention:** For more information, see Navigating the User Interface.
"Bread Crumb" Trail	Browse Applications > Accounting > Accounts Payable > Voucher Processing > Create Recurring A The "Bread Crumb" trail displays in the center of the Navigation Toolbar whenever you view and work in an application, so you always know your current location, as well as the path you took to get there. The Bread Crumb trail also provides convenient navigation, since you can click any item in the trail (for example, a domain, module, or application group) to go to that location. As an example, you can click **Billing** to go directly back to the Billing module.

Toolbar Option	Function
System Message(s)	Click to display administrative messages. This icon displays for the logged-in user only if there are system messages for him/her to see.
User Preferences	Click to modify displays for your Navigation Toolbar, current application layout, and My Menu. ▪ **Application Layout Changes**: Click **Save** to retain the current application display. For example, you might want a specific subtask to automatically display every time you access a particular application. You can also save the order of the columns for a particular table. Click **Reset** to revert to the default settings for this application. ▪ **Global Toolbar Icon Options:** Click **Edit** to configure the Global Toolbar. You can rearrange the display of function icons, as well as add or remove them. You can also choose whether to display function labels for the icons. Your configurations apply for each application type. For example, if you configure the Navigation Toolbar on the Manage Project Billing Information application, that configuration will apply for all Data Entry applications in Costpoint. Click **Reset** to return the toolbar display to the default setting. ▪ **Auto Positioning On**: In the Classic view of the UI, select this check box to resize applications to fully utilize screen space. ▪ **Manage User Profiles**: Select the user profile you want to view from the list. Click **Manage Profile** to open the user profile. All applications must be closed to access User Profiles. If applications are open, click **Close Applications** to close them or click **View Applications**

Toolbar Option	Function
	to identify the open applications and then close them. Click the **Configure User Preferences** link at the bottom of the window to modify the contents of My Menu in the **Configure User Preferences** screen. From the My Menu Application List in the bottom left pane, click the column with the check adjacent to each application you wish to add to My Menu (CTRL+Click for multiple applications). Next, click Select. The applications you selected displays in the My Menu pane on the bottom right. Click **File** » **Save** from the Global Menu, or click from the Global Toolbar to save your preferences.
Select Company	Click to display the Select Company dialog box. Available companies display in the drop-down list. Select the desired company and click the **Change** button. You can then access data for the designated company through My Menu or Browse Applications. **Warning:** You must save database changes and exit all open applications for the current company before you can switch to another company.
Sign Out	Click to exit.

Application Toolbar

The table below describes **File** menu functions, including available shortcut keystrokes.

Not all menu and toolbar functions are available for all applications. Functions that are unavailable for a given application do not display.

Application Toolbar

The **File** menu contains items to manipulate database tables and records, including **Save**, **Delete** and **Query**.

Menu Option	Function
New Record (F2)	Click New to enter a new record on the screen in either Form or Table View.
Delete (CTRL+DEL)	Click Delete to mark the current record for deletion from both the database and from the **Query** result set. When you click Delete for a record displayed in Table View, X displays in the far left column for that record, while in Form View the X displays on the upper left side corner of the application. This X indicates that the record is flagged for deletion the next time you save your work to the database. **Warning:** This menu option deletes everything currently on the main screen, including any subtask information. For screens with table windows, this feature deletes all rows on the table window. To delete only one row on a table window, click **Delete** in the **Line** menu.
Undelete	Click Undelete to undo your most recent deletion. The "marked for deletion" indicator, X, no longer displays in the far left column. This option only displays if there is a record marked for deletion. After you mark a particular record for deletion and then **Save**, you can no longer undelete that record.
	Click **Copy** drop-down and select **Copy Record** to duplicate a record, but not its child records. Choose this option if you want to duplicate only one level of a record (at any level). The other available options are: - **Copy Data to Insert into Excel**: Use this option to copy the record to Microsoft Excel. - **Copy Data to Paste into New Record(s)**: Select this to copy the record as another parent record.

Menu Option	Function
	▪ **Paste Data**: Select this if you just copied a record and want to paste it as a new record.
	Click Attach to attach a document to the currently selected record.
Query (F11)	Click Query ▼ to populate an application with a result set of database records that are maintained by that application. You can place filters on the query to limit the result set to those records meeting specified selection criteria. For form-type maintenance screens, select **Query** to set up a data query and define parameters for your database search. Use the Find tab to narrow your search. Use the Sort tab to specify the order in which they should be sorted. Click the **Find** button to display the result set. You can also see saved queries on the Saved Queries tab. Click Query ▼ to access this function from the toolbar.
First (CTRL+UP ARROW)	Click to retrieve and display the first record in the database. In Table View, this is the first row on the main screen or subtask.
Previous (CTRL+LEFT ARROW)	Click to retrieve and display the prior record in the database. This would be the record immediately before the one currently displayed.
Next (CTRL+RIGHT ARROW)	Click to retrieve and display the next record in the database. This would be the record immediately following the one currently displayed.
Toggle View (ALT+T)	After you create a new record by cloning an existing record, use this option in Form View to switch back and forth between the new record and the existing record.

Menu Option	Function
Last (CTRL+DOWN ARROW)	Click ▶| to retrieve and display the final record in the database. In Table View, this is the last row on the main screen or subtask.
Switch to Form View (CTRL+M)	Click Form to change the display format for the current record from Table View to Form View. The Form View icon displays only when the current record displays in Table View.
Switch to Table View (CTRL+M)	Click Table to change the display format for the current record from Form View to Table View. The Table View icon displays only when the current record displays in Form View.
Select This Record Deselect This Record	Click ☑ to select the current record. Click ☐ to deselect the current record. These options display only in Form View.
Maximize	Click ☐ to maximize the size of the application screen.
Restore	Click ❐ to display the default size of the application screen.
Set Always on Top	Click 📌 to pin or constantly display a subtask of an application even if you use its parent or main screen.
	Click Email to view messages related to the current record or to send messages with attachments.
Close	Click ✕ to close the current application.

Application Functions

Application Functions: General Information

This section provides information on fields, options, and buttons used throughout the Costpoint product suite. It also explains terminology and software behavior.

Browse, Add, Change

To browse information, click **Query**. You can use **Query** to locate and display records.

Adding data records or changing existing ones, operates in just one of two modes:

- **Insert Mode**: Use this mode to add data. You can activate the Insert mode by clicking **New** on the toolbar.
- **Update Mode** : Use this mode to edit data. Records automatically display in Update mode so you can edit them.

Main Screens vs. Subtasks

When you select an application, the main screen for that application displays. When you select one of the links located at the bottom of an application, a subtask screen displays. Subtasks collect and store additional information (also known as child data) related to the selected record on the main screen.

Table Windows

When you add, delete, or edit a line while working in table windows, symbols display beside each line that designate which lines will change when you save your table:

- : Indicates rows that contain data you have modified.
- : Indicates rows you have added.
- : Indicates rows you have marked for deletion.

To enter a new row of data into a table window, you must first select the **New Record** option from the Line menu.

Field	Description
Find	To find a value in a column, right-click the column heading and then click **Find**. On the dialog box, enter your search criteria and then click the **Find** button.
Replace	To replace a value in a column, right-click the column heading and then click **Replace**. On the dialog box, enter your replace condition(s) and then click one of these buttons: ▪ **Replace**: Use this to replace a value on the current row you selected. ▪ **Replace&Find**: Use this to replace value(s) and find the next row that meets your replace condition(s) ▪ **Replace All**: Use this to replace all values in the column that matches your replace condition. You can use the **Stop** button to halt the replace process. ▪ **Find**: This is similar to the **Find** button that you see on the Find tab. Use it to search for a value. ▪ **Stop**: Use this to halt an ongoing replace process.
Lock/Unlock Columns	You can freeze a column when you scroll to the right when you apply the Lock Column feature. To do this, right-click the column heading that you want to lock, and then click **Lock Columns**. You can unlock the column when you right-click its heading and click **Unlock Columns**.

Field	Description
Resize Column	To resize a column, on the column heading, hover to the right border of the column until a bi-directional arrow appears. Click and move the arrow to adjust the column size. You can also right-click the column heading and then click **Resize Column**. Click and move the bi-directional arrow that appears to adjust the column size.
Move Column	To move a column, click the column heading and drag it to a certain position in the table. You can also right-click the column heading, click **Move Column**, and drag the column to a certain position in the table.
Sort Ascending	To sort a column in ascending order (that is, from the lowest value to the highest), right-click the column heading to sort so you can see the sort options available. And then, click **Sort Ascending**. ▪ For characters, an ascending order will be from A to Z. ▪ For numeric digits, an ascending order is from the lowest number to the highest. ▪ If both numeric digits and characters are in the list, numeric digits will be listed before characters.
Sort Descending	To sort a column in descending order (that is, from highest to lowest), right-click the column heading to sort so you can see the sort options available. And then, click **Sort Descending**. ▪ For characters, a descending order will be from Z to A. ▪ For numeric digits, a descending order is from the highest number to the lowest. ▪ If both numeric digits and characters are in the list, characters will be listed before numeric digits.
Arrange Table Columns	You can change the order of the columns in a table window when you click and drag a column heading to a certain position in the table. Another way is to use the Arrange Table Columns dialog box. To open this, right-click any column heading and then click **Arrange Table Columns**. On the dialog box, arrange the order of the columns through the **Move Up** or **Move Down** buttons. Enter the number of columns you will lock when you scroll to the right in the **Locked columns on left side** field. Click **Apply** to save changes, and click **Close** to exit the dialog box. To return to the original positions of the column headings, click **Options** » **Reset Default Positioning and View** or press SHIFT+ALT+Z.
Show/Hide Screen Controls	To show or hide columns, right-click the column heading and then click **Show/ Hide Screen Controls**. On the dialog box, click **Data Fields** or **UI Controls** to see the options available. Select the **Always Hide** check box next to the item(s) you want to hide, and then click **Apply**. The selected item no longer appears in the table layout. Click **Close** to exit the dialog box. To make changes permanent, save the Application Layout after clicking **Apply**.

Field	Description
	To display hidden columns, open the dialog box, clear the **Always Hide** check box, click **Apply**, and save the Application Layout.

IDs and Codes

When creating IDs and codes or entering them in a field (for example a part ID), you should observe the following guidelines:

- Never embed spaces in **ID** or **Code** fields.
- Never embed single quotes (') in any field.
- Letters within IDs and codes should all be upper case.

If you are unsure of an ID or code required for a particular field, you can use Lookup to search and select available values.

Segmented IDs

In certain fields (for instance, account, organization, project, reference number 1, reference number 2, alternate project reporting, and alternate organization), segment separators (periods or dashes) automatically display when you enter a value. These multi-level items are called "segmented ID" fields.

Range Options

Use **Range Options** to limit the scope of records you want to include in a report, process, or inquiry. The system-defined options are:

- **All**: This option allows you to choose all available records in a database table.
- **One**: This option allows you to choose one of the available records in a database table.
- **Range**: This option allows you to choose a specific range of records in a database table.
- **From Beginning** - This option allows you to define a range from the beginning of a database table to a selected ending record.
- **To End**: This option allows you to define a range from a specified beginning record to the end of the database table.
- **Non-Contiguous Range**: Select this check box on the main screen and then use the Non-Contiguous Ranges subtask to select a noncontiguous range of records (for example, projects or employees). This is different from using a regular range because you can include or exclude any records of your choice. You can enter more than one row.

Field	Description
Select/Delete (or Deselect)	Use the **Select** or **Delete** buttons when you make selections and transfer items between two table windows. ▪ To move data in the top or left window to the bottom or right window, choose an item from the table window or top window and click the **Select** button.

Field	Description
	▪ To remove data in the right or bottom window, choose the item and click the **Delete** button.
OK	Click **OK** to save the current data and return to the previous screen.
Cancel	Click **Cancel** to remove your additions, changes, and deletions and return to the previous screen.

Logging Out

To exit, click on the Navigation Toolbar, click **File** » **Log Out** from the Global Menu, or press CTRL+SHIFT+F12.

Clone Record and Copy Record

Use the Clone Record or Copy Record feature to create a new record that contains information from an existing record. The differences of these two features is their availability that depend on the types of records that will be copied. They are not available for all functions.

- Use the Clone Record feature when you copy records that have a header (parent) and detail (child) information.
- Use the Copy Record feature when you copy data that involves just a single record or "child" rows. This is generally used when copying report parameters such as the Print Account List.

After you use clone or copy, the new record displays containing the data you copied except for the key which you must provide.

You can select **Save and Continue** after you enter your changes on the screen.

After you create a new record by cloning an existing record, use **Toggle View** to switch back and forth between the new record and the existing record. This is particularly useful for Form View-only screens.

Cloning a Record

To clone information:

1. Open the application where you want to copy a particular record.
2. Once you have opened the application screen, search for the record that you want to copy.
   You can use **Query** to search for it.
3. When the selected record is displayed, select **File** » **Clone Record** to copy the record.
4. Enter primary key(s) and any other information that you want to change.
5. Click **Save**.

Copying a Record

To copy a line:

1. Open the application where you want to copy a particular line.
2. Once you have opened the application screen, search for the record that you want to copy.
   You can use **Query** in the table window to search for it.
3. When the selected line is displayed, select it and go to **Line** » **Copy Record** or click the **Copy** drop-down on the table window and select **Copy Record**. The other options in the **Copy** button are:

Option	Description
Copy Data to Insert into Excel	Use this option to copy the line to Microsoft Excel.
Copy Data to Paste into New Record(s)	Select this to copy the line into another parent record.
Paste Data	Select this if you just copied a line and want to paste it on the table window.

4. Enter primary key(s) and any other information that you want to change.
5. Click **Save**.

File Upload Manager

Use this dialog to select a text file for upload to a database.

You can access this dialog from any application by clicking **Process** » **File Upload** from the Global Menu.

The ID of the application uploaded is tagged to the uploaded file. Since the application ID determines which application you must use to access the file, it is important to upload files from the application in which they will eventually be used.

If you are running an import application (preprocessor), you can use this dialog to select the import file that contains the data you want to import.

To download or delete a file from a database, use the Export Files screen.

There are two ways to work with input files:

- You can access the input file from the network by using Alternate File Locations.
- You can use the File Upload Manager to upload the input file to the database, in which case no further access to network folders is necessary.

Contents

Field	Description
File Name	Enter the path and file name of the file you want to upload to the database or to an alternate file location, or click **Browse** to open a dialog and select the file.
Description	Enter a description of the file you are uploading.
Alternate File Location	Enter, or click to select, the alternate location to which you want the file saved. If you do not specify a location in this field, it tags the file with the application ID and stores it in the database.
Expiration Date	Enter, or click to select, the expiration date of the file. After this date, the file is eligible for purging on the Export Files screen.
Overwrite?	Select this check box to overwrite any duplicate files that already exist in the database.
Support Issue ID	This field displays when you enter an **Alternate File Location** that is set in the **Case Attachments Root Location** field found on the Configure System Settings screen. Enter, or click to select, the Support Issue ID where you want to upload a file attachment.
Upload	Click this button to upload the file.
Close	Click this button to close the File Upload Manager dialog box.

Lookup

Select this feature to look up and select available values in cases where you are unsure of the ID or code you need to complete a particular field.

The Lookup dialog box displays a table containing the values that are available for entry in a specific field on the screen. You can scroll through the displayed values or use Query (on the Lookup) to narrow your search. When you select a value, it displays in the field from which you launched the Lookup.

Alternatively, you can place your cursor in a non-numeric or non-date character field and then enter the first few letters of the data that you seek. The records displayed filter automatically, according to your entry.

Certain fields also contain the Lookup feature. These fields display a thick blue line on the right side: 1. Mouse-over the blue line to display the Lookup icon: 1. To display the Lookup dialog, click the Lookup icon or press F10 on your keyboard.

Menu Option	Description
Select	Click this button to bring the selected row into the field from which you executed Lookup.
Cancel	Click this button to close **Lookup** and return to the previous screen. The field from which you executed **Lookup** remains unchanged.

AutoComplete Feature

Another way of searching for an existing value is to use the AutoComplete feature. This feature is available in fields where the lookup icon is found.

The AutoComplete feature lets you type in the first few characters of an existing code or ID that you are looking for, and then it displays the values that match your entry.

For example, in the **Fiscal Year** field of the Manage Subperiods screen, you enter the value **201**. Costpoint will display the existing values that start with **201** such as **2010**, **2011**, **2012** and so on.

Query

Use Query to define search parameters for data records maintained by the present application. Query is available in form-type maintenance applications.

Using the fields on the **Search Criteria** group box, specify the parameters for your record search.

Find Tab

Search Criteria

Using the fields in this section, select search criteria to narrow your search. You can enter information in one or all fields; however, the more parameters you enter, the narrower your search results.

The search criteria vary depending on both the application and the type of record for which you are searching for (for example, whether you are looking up an employee, voucher, or project). The search criteria vary by type of application. As an example of how **Query** search criteria works, we can look at the Manage Employee Information application. For this application, among the criteria available are **Employee** and **Displayed Name**. For both of these items, select from the center drop-down list one of the following relational parameters:

- Is equal to
- Begins with
- Contains

In the corresponding fields on the right, enter values (partial names, letters, and/or numbers) that match the **Employee** and/or **Displayed Name** you are searching for.

To further narrow your search, in the third row, **Status is**, you can select from the drop-down list on the right one of the following options:

- Active

- Family Medical Leave
- Inactive
- Inactive Accruing Leave

After you enter or modify a parameter, click to preview the number of records Costpoint will return based on your current parameters.

Query Tab

The Query Tab contains additional parameters for your search.

Query Condition

In this section you can enter additional parameters. For example, on the Manage Employee Information screen, some of the parameters included are the following:

- Adjusted Hire Date
- Birth Date
- City
- Contractor

Select a qualifier in the second field (for example, for **City**, you can select **Begins with**). In the third field, enter the initial letters for the desired City (for example, "Chi" for Chicago). Click to add the parameter you have selected to the **Return all records where:** window. Repeat this process to add additional parameters to the **Return all records where:** window. You can then click to preview the number of records matching your parameters, or click **Query** to display the actual records. Delete a parameter by highlighting it and clicking .

Sort Tab

Use the contents of this tab to arrange the display of your search results.

For example, on the Manage Employee Information screen, select from criteria like **Adjusted Hire Date**, **Contractor**, and **Disabled Veteran** for sorting your record results. Use the Up and Down Arrows to move a condition up or down in priority. You can delete a sort condition by highlighting it and clicking .

Contents

Field	Description
Sort Records By	From this drop-down list, select any field on which the result set should be sorted.

Field	Description
	▪ **Ascending**: Select **Ascending** if you want the results sorted in ascending order. ▪ **Descending**: Select **Descending** if you want the results sorted in descending order.
Add Sort Parameter	Click + to add additional sort parameters, using the **Sort Records By** and **Ascending/Descending** fields to filter your results.

Saved Queries Tab

The Saved Queries tab lists existing queries that have been saved by the user or the administrator for a given Costpoint application.

Contents

Field	Description
Save All	You can make multiple revisions to different saved queries without having to save each change beforehand. Click Save All to retain all changes to the queries.
Count	Click Count to display the number of results that Costpoint will return based on the query as you structured it. If the resulting number is too large, you can further refine your Query parameters to narrow your search. You can then click **Count** again to display the new number of records Costpoint will return based on your refined parameters. You will still need to run your query to see a display of the records that match the criteria selected.
Save Query	Click Save Query to display the Save Query dialog box and assign a **Query ID** and **Query Name** to your present query and retain it for later use.
Reset	Click Reset to clear the fields of the current query criteria from the dialog box.
Find or Query	Click the **Find** or **Query** button to initiate the data search based on the parameters you entered. If the query returns more than one record, Costpoint displays the search results in a table. If the query returns just one record, that record displays in form-view format.
Close	Click the **Close** button to exit the Query dialog box.

Linked Content Files

The Content Management System (CMS) Integration feature allows you to link content files located in a third-party management system to a Costpoint product suite record.

For example, you can link a scanned PDF of a vendor invoice to the Costpoint accounts payable voucher record it was used to generate. You can also link other content, such as engineering drawings or video work instructions, to an assembly part or routing record in Costpoint.

Before you can use this feature, you must:

- On the Costpoint Web Configuration utility, define the connection between the product and a third-party CMS. For more information, see the **Deltek Costpoint 7.1.1 Configuration Utility** guide.
- On the Manage Content Types screen in System Administration, specify the types of electronic content (typically documents) that you want to link from a third-party CMS to a Costpoint data record.
- On the Manage Application/Content Links screen in System Administration, specify which types of content can be linked to a specific Costpoint application and result set.

To link a content file to an application result set, open that application and click on the toolbar. does not display in a particular application unless you set up the application for linking in the Manage Application/Content Links screen.

When you click , the Linked Content Files screen displays. Use this screen to create, maintain, view, or delete a link between a specific content file stored in a Content Management System (CMS) and a specific Costpoint database record.

Links created in one application/result set for the specific content type are visible in other applications if both applications have defined linking rules to the same content type.

> **Attention:** For information about generating Costpoint report files and export files and saving them to the CMS, see Saving Files to the CMS.

Contents of the Linked Content Files Screen

Use the fields and options to configure the Linked Content Files screen.

Contents

Field	Description
Content Type	Enter, or click to select, the ID of the content type to be linked to the Costpoint record.
Content Type Description	This non-editable field displays the content type description.

Field	Description
Content File Name	Enter, or click 🔍 to select, the name of the file to link to the Costpoint record. Use colons to separate the sections in the path (for example, CMS:Repository:Folder:Filename). After you save the record, only the content file name itself displays in this field. Clicking 🔍 displays the CMS file names and their common properties including the CMS columns that you selected in the **Lookup Position** field on the Content Data Fields subtask of the Manage Content Types screen. Any queryable content data field can be used in the creation of a search condition.
Notes	Enter any notes related to the linked content file.
View	Click this button to view the selected file. You cannot view files over 10 megabytes in size. When you click this button, Internet Explorer downloads the file from the CMS. After the download is complete, Internet Explorer opens the appropriate file viewer.

Subtasks

Subtask	Description
Content Data Fields	Click this link to open the Content Data Fields subtask

Content Data Fields Subtask

Use this subtask to view content property information from the Content Management System.

If you are allowed to do so by the settings on the Manage Application/Content Links screen, you can manually modify the CMS property values on this subtask. You can also click the **Load Content Data Fields with Costpoint Record** button to automatically load specific field values from a Costpoint record into the appropriate CMS properties.

You can also load values from the CMS properties into the appropriate fields of the current Costpoint record. For example, you could scan a vendor invoice into your CMS and add content properties. Later, you could go into Costpoint to create a voucher. Instead of manually entering the data into the Costpoint fields, you could click the **Load Costpoint Record with Content Data Fields** button to populate the fields.

Contents

Field	Description
Content Data Field	In the first row of the table, this field displays the content location. In the rest of the rows, this field displays the content data field ID.

Field	Description
Content Data Field Description	This non-editable field displays the content data field name.
Data Type	This field displays the data type. Valid values are: ▪ Text ▪ Number ▪ Date
Text Value, Date Value, Number Value	In the first non-editable row of the table, the **Text Value** field displays the CMS ID, Repository Name, and File Path. In the rest of the rows, enter the appropriate value (text, number, or date, depending on your selection in the **Data Type** field) for the content data field and CMS property. If the field is linked to a CMS content property, the value in the CMS is modified for this content file. If you are viewing this screen in Form View, only the appropriate field displays, depending on your selection in the **Data Type** field.
CMS Content Property	This field displays the CMS content property.
Load Costpoint Record with Content Data Fields	Click this button to load the selected Costpoint record with the appropriate CMS properties from the content file. If you click this button, the application copies the content property data from the content data fields to the corresponding Costpoint column values (both hidden and visible). It copies values only for content data fields that are linked to Costpoint columns in the Manage Application/Content Links screen. For visible columns, the changes appear immediately on the Costpoint screen. Normal Costpoint validation occurs for the fields with new values. For example, you could scan a vendor invoice into your CMS and add content properties. Later, you could go into Costpoint to create a voucher. Instead of manually entering the data into the Costpoint fields, you could click this button to populate the fields.
Load Content Data Fields with Costpoint Record	Click this button to load the CMS properties for this content file with values from the selected Costpoint record. If you click this button, the application copies the Costpoint data (not the database information for previously saved records) to the content data field values. It copies values only for content data fields that are linked to the Costpoint table columns in the Manage Application/Content Links screen. CMS properties linked to content data fields are also updated when you save.

Table Information for the Content Data Fields Subtask

Changes to the Content Data Fields screen update several tables.

Updated tables include:

- CMI_CONT_FILE
- CMI_CONT_FILE_FLD

Table Information for the Linked Content Files Screen

Changes to the Linked Content Files screen update the CMI_CONT_FILE table.

Saving Files to a CMS

You can use the Manage Alternate File Locations screen to link an alternate file location to a specific content type for a given CMS. After you link the alternate file location to a content type, you can generate Costpoint report files and export files and save them to the CMS.

Generate and Export a Report File to a CMS

To generate a report file and export it to a CMS:

1. On the screen, set the parameters for your report.
2. From the menu, click **File** » **Print Options**.
3. Select the **Print to File** check box.
4. On the File Options tab, select the **File Type**, and enter the **File Name**.
5. In the **Alternate File Location** field, enter, or click to select, the CMS to which you want to export the report file.
6. Click **OK**.
7. Click .
   The application generates the report file and saves it to the CMS.

Generate an Export File and Save It to a CMS

To generate an export file and save it to a CMS:

1. On the screen, set the parameters for your export file.
2. In the **File Location** field (the name used in most screens), enter, or click to select, the CMS to which you want to save the export file.
   Clicking displays the alternate file locations you set up for the content type on the Manage Alternate File Locations screen.

3. Click .
   The application generates the export file and saves it to the CMS.

Print Options

There are numerous methods for printing reports.

You can:

- Print to a printer attached to your network
- Print to a file
- Download the report as a file
- Print to a file and email it
- Archive your report for future viewing
- Print to a local printer

Click to open the Print Options dialog box and select options for printing. This dialog box has four tabs:

- System printer tab: If you select the **System Printer** delivery option check box, use this tab to select the network printer you want to use and other options.
- File Options tab: If you select the **Print to File** or **Download** delivery option check boxes, use this tab to select the format of the file you want to create and other options.
- Email tab: If you select the **Email** delivery option check box, use this tab to enter the email information.
- Archive tab: If you selected the **Archive** delivery option check box, use this tab to save your report for later printing.

Identification

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

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

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

Field	Description
	When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query. You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.
Description	Enter, or click Query to select, a parameter description of up to 30 alphanumeric characters.

Delivery Options

Use this group box to select the delivery option for your report.

Note: The **Print to File** and **Download** options have nearly the same function, but you cannot send your report to the process server if you select **Download**.

Field	Description
System Printer	Select this check box to send the report to a printer attached to your local network. If you select this check box, the System Printer tab is available. Use this tab to select which printer you want to use and other options. Use the Manage System Printers screen to set up printers for use in Costpoint. This check box is not available unless the report category to which this report belongs has the **Allow System Printer** check box selected on the Manage Report Categories screen.
Print to File	Select this check box to print your report to a file. If you select this check box, you can use the File Options tab to select which file format you want to use and specify the location. This check box is not available unless the report category to which this report belongs has the **Allow Print to File** check box selected on the Manage Report Categories screen.
Download	Select this check box to save your report to a file on your computer. If you select this check box, you can use the File Options tab to select which file format you want to use. When you click , a dialog box displays that you can use to select the location. If you select this check box, you cannot send this report to the process server. This check box is not available unless the report category to which this report belongs has the **Allow Local Printer/Download** check box selected on the Manage Report Categories screen.
Email	Select this check box to email the report, which is included as a file attachment. Use the File Options tab to select the file format and the Email tab to enter the email information. If your email address is set up on the Workflow tab of the Manage Users screen, the email is sent from your email address. Otherwise, the email is sent from the workflow email address (for example, workflow@<company name>.com).

Field	Description
	This check box is not available unless the report category to which this report belongs has the **Allow Email** check box selected on the Manage Report Categories screen.
Archive	Select this check box to archive your report. Use the Archive tab to enter ID information for your archive and specify how long you want it kept. To print an archived report, use the Print Archived Reports screen. This check box is not available unless the report category to which this report belongs has the **Allow Archive** check box selected on the Manage Report Categories screen.
Local Printer	Select this check box to send your report to a local printer. A local printer is a printer that is attached directly to your computer. If you select this check box, the **Submit Batch Job** check box is not available. To find out how to set up a local printer, click here. This check box is not available unless the report category to which this report belongs has the **Allow Local Printer/Download** check box selected on the Manage Report Categories screen.

Queueing

Field	Description
Submit Batch Job	Select this check box to submit your report as a batch job to the process server. If you select the **Download** or **Local Printer** check boxes, this check box is unavailable.

Document Locale

Field	Description
Locale	Use this drop-down list to select your report locale. The locale determines how report data is formatted in terms of language, numbers, and date/time preferences. Locales are set up by your company.

Pages

Field	Description
All	Select this check box to print all the pages in the report. If you do not select this check box, you must enter the pages you want to print in the **Pages** field.
Pages	Enter the page number you want to print. Separate page numbers with commas, and indicate ranges with a dash. For example, enter **1, 4, 10-12** to print pages 1, 4, 10, 11, and 12.
Print Cover Page	Select this check box to print the report's cover page.

Tabs

System Printer Tab

If you selected the **System Printer** delivery option check box, use this tab to select the network printer you want to use and other options.

Printer

Field	Description
Printer	Use the drop-down list to select the printer you want to use. The printers that display in the list are those that have been set up for you or your user group on the Manage System Printers screen.
Name	This field displays the name of the **Printer** you selected.
Resolution	Use the drop-down list to select the printer resolution you want to use. Resolution is expressed in terms of dots per inch (dpi). Generally, the more dots, the sharper the print. However, the default resolution is acceptable for most purposes. The selections in this drop-down list depend on the **Printer** selected.
Scale	Use the drop-down list to adjust the scale of your report, making it larger or smaller. Costpoint reports are designed and implemented to have precise page layout and margins. The ideal print out is achieved when the report data is printed without scaling. For best printing results, it is very important not to scale the report content to page. Depending on your version of Adobe or Acrobat Reader, you need to set one of the following print options: ▪ **Page scaling** = **None** ▪ **Page Sizing & Handling** = **Actual Size**
Color Printing	Select this check box to enable printing in color if your printer is color capable.
Paper Source	Use this drop-down list to select the paper source.
Print on Both Sides	Use the drop-down list to make a selection. Valid options are: ▪ **SIMPLEX**: Select this option to print only on one side of the paper. ▪ **HORIZONTAL**: Select this option for landscape printing. ▪ **VERTICAL**: Select this option for portrait printing.
Printer Type	This field displays the type of printer you selected. This is usually the brand name and model.

Field	Description
Location	This field displays the printer's location.

Copies

Field	Description
Number of Copies	Enter the number of copies you want to print. The default is **1**.
Collate	Select this check box to collate the reports.

File Options Tab

If you selected the **Print to File**, **Download**, or **Email** check boxes, use this tab to select the format of the file you want to create and other options.

File Options

Field	Description
File Type	Use the drop-down list to select the format of the file you want to create. Valid options are: ▪ Excel ▪ PDF ▪ DOC ▪ PPT If you are viewing a report in PDF format, make sure to configure the settings of your PDF reader to display PDF in your browser.
File Name	Enter the name of the file, or click and enter the name.
Alternate File Location	Enter, or click to select, the location to which you want the file saved.

Email Tab

If you selected the **Email** check box, use this tab to email the report as a file.

If your email address is set up on the Workflow tab of the Manage Users screen, the email is sent from your email address. Otherwise, the email is sent from the workflow email address (for example, workflow@<company name>.com).
Use the File Options tab to select the format of the file and provide a name.

After you enter the email information, click **OK** and then click  on the main screen to create the report as a file and send the email.

Email

Field	Description
To	Enter the email address of the recipient.
Cc	Enter the email address of any secondary recipients.
Subject	Enter a subject for the email.
Additional Attachments	Click (icon) to add an additional attachment. Enter the **File Name** and **Location** in the table.
Text	Enter the text of the email.

Archive Tab

If you selected the **Archive** check box, use this tab to save your report for later viewing.

To print an archived report, use the Print Archived Reports screen.

You cannot archive a report unless the report category to which the report belongs has the **Allow Archive** check box selected on the Manage Report Categories screen.

Your System Administrator may have disabled certain fields on this tab, indicating that your company has chosen to enforce its own archive rules. Contact your System Administrator for more information.

Archive

Field	Description
Archive ID	Enter the ID of the archive.
Description	Enter a description for the archive.
Never Delete	If you select this check box, this archive is stored permanently. Costpoint will not delete it.
Delete When Older Than	Select this option to have Costpoint delete the archive when it reaches a certain age. In the two fields to the right, enter the age that the archive must reach before Costpoint deletes it. In the first field, enter the number of units of days, weeks, months, or years after which this report is deleted. In the second field, use the drop-down list to select the unit. For example, you could enter **12** in the first field and select **Weeks** in the second. The archive would be deleted when it is 12 weeks old.

Field	Description
Delete After	Select this option to have Costpoint delete the archive after a certain date. In the field to the right, enter, or click to select, the date after which Costpoint deletes the archive.

Procedures

Setting Up and Using a Local Printer

You must have access to the Manage Users and the Manage Report Categories screens. If you do not have access to these screens, contact your System Administrator.

To set up and use a local printer:

1. On the Printing Defaults tab of the Manage Users screen, select the **Local Printer/ Download** check box in the **Delivery Options Enabled for this User** group box for your Costpoint user ID.
2. On the Manage Report Categories screen, select the **Allow Local Printer/Download** check box for any report categories whose reports you want to print.
3. Connect the printer to your computer.
4. Log on to Costpoint.
5. Open the appropriate screen for the report you want to print, and select the report parameters.
6. Click to open the Print Options dialog box.
7. If you want to save your report parameters after printing, enter a **Parameter ID** and **Description**.
8. In the **Delivery Options** group box, select the **Local Printer** check box.
9. In the **Pages** group box, select whether you want to print the entire report or just certain pages.
10. Click **OK** to return to the report screen.
11. Click to print the report.

    If you are viewing a report in PDF format, make sure to configure the settings of your PDF reader to display PDF in your browser.

Generate Random Password

This convenient Web-only function enables your system administrator to assign temporary passwords to single or multiple users. Costpoint generates temporary passwords based on the password complexity policy as defined in the Change Password function.

Costpoint electronically notifies users via email, which is sent to individual users only. Your system administrator does not know the password.

The randomly generated password assigned to each user is temporary. The user must change it after logging in.

Requirements for Random Password Generation

Prior to enabling Random Password Generation, you must do the following:

1. Set up the email server information in the Company Settings block of the Configure System Settings screen.
2. Enter the **Email Name** (address) for the end user in the Workflow tab of the Manage Users screen.
3. Set the **Authentication Method** for the user to either **Costpoint Database** or **Windows Domain & Costpoint Database** as defined in the Authentication tab of the Manage Users screen.

Generate a Random Password

To generate a random password for selected users:

1. After meeting the requirements for random password generation (see list above), open the Manage Users screen and click Query ▼ to identify any users who require a random password.
2. Click Table to view a list of employees.
3. Select the user(s) who require a random password.
   Click in the box before the user's name or use CTRL+Click to select multiple names.
4. Click  or right-click anywhere on the screen.
   The **Generate Random Password** icon displays.
5. Click  to generate random passwords for the selected users.
6. When prompted to generate a new password for selected users, click **OK**.

Warning: If no users have been selected, Costpoint generates a new password for ALL queried users. Costpoint generates random passwords and emails them to users. No one other than the individual user sees the password. Costpoint prompts the user to change the password at the next login.

Auto Generate Random Password

If edits or changes to the user's information are not required, use the Generate Random Password procedure; if, however, edits or changes are the main purpose of the session, you can generate a random password at the same time by selecting **Generate Random Password**, which automatically triggers password generation after you save the user information. This method is designed especially for creating new users.

To generate random passwords automatically for new or existing users, do one of the following:

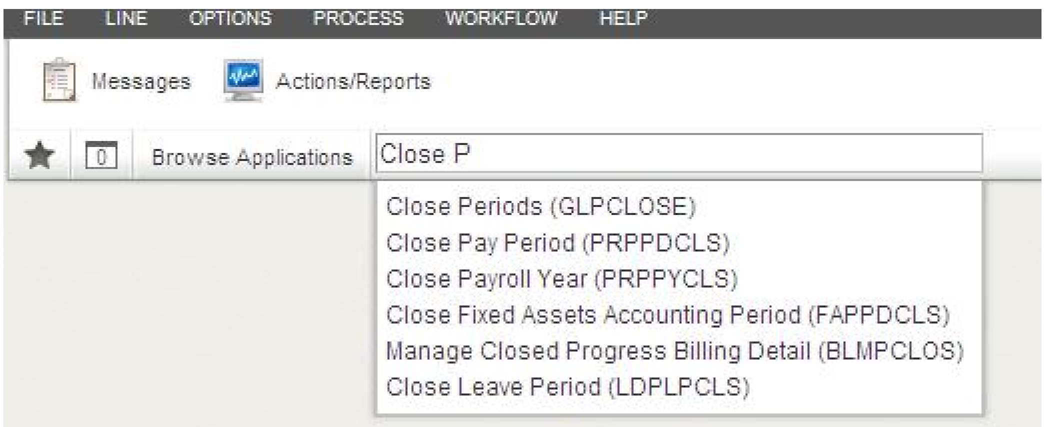
- When creating a new user, select the **Generate Random Password** check box on the Authentication tab of the Manage Users screen. When you save the information for the new user, Costpoint sends an email containing the random password and clears the check box.
- When changing information for an existing user, you can also select **Generate Random Password** to generate a random password and send an email after you save the updated information. To prevent future (unwanted) generation of random passwords, Costpoint then automatically clears the check box.

Searching for an Application

In addition to providing easy access to various applications through the **Browse Application** feature, Costpoint comes with a **Search** feature to help you quickly locate the application needed.

You can easily search for an application in the field beside the **Browse Applications** label. When you type a portion of either the application name or ID, Costpoint will automatically display the application names that match your entry.

In the example below, **Close P** has been entered and there are six items that match it. You can now simply select which of the matched terms is the application you require.



Support Options

Support Services

Deltek offers a variety of support services.

- **Deltek consulting**: Take advantage of our on-site consulting services to help with your implementation, data conversion, and other product-related needs.
- **Webinars**: Keep pace with the changing technology landscape by enlisting in Deltek University webinars that provide information on using Deltek products.

- **Telephone support**: Call us when you need detailed, specific answers to your question.
- **General assistance**: Benefit from our comprehensive guidance in designing, procuring, and installing your database software, operating systems, and hardware.
- **Turnkey network installations**: Avail of our expertise in matching your product to appropriate hardware and network architecture using pre-tested configurations and equipment.

Customer Care

Our trained support staff are available for ongoing phone support. If you require on-site or remote support, we are happy to schedule our next available general or technical consultant.

When to Call

We encourage you to call whenever you encounter a problem or a question that the product documentation cannot resolve. For maximum efficiency, we recommend appointing one person in your company, or in each department, to be your firm's local expert. All questions should be first addressed to your local expert. If your expert cannot resolve the problem, then he or she should contact us.

Select regular, extended, or emergency support, based on when you need to call.

Support Hours

The telephone number for Costpoint Customer Care is 877-457-7765 (877-HLP-PROJ).

Support lines are open during the following hours:

- Monday - Friday: 7:00 a.m. to 10:00 p.m. Eastern Standard Time
- Premium clients receive 24 hour per day support Monday - Friday
- Select clients receive 24 hour support seven days per week.

Holidays on which Deltek Customer Support offices are closed are as follows:

- New Year's Day
- Memorial Day
- Independence Day (July 4)
- Labor Day
- Thanksgiving
- Christmas Day

Returning your call: Information on Deltek's call tracking system

In handling support calls, Deltek strives to minimize your waiting time. Instead of requiring you to wait on the line until support personnel become available, Deltek's team of Support Receptionists log you in to our call-tracking system. You do not need to explain your problem to the Support Receptionists (they do not have the skills necessary to resolve your issue). You can call at **877.457.7765 (877.HLP.PROJ)**. The Support Receptionist will ask you for the following information:

- Your Contact ID (or Client ID)
- Your name and phone number
- The product you are calling about
- Whether your call is general or technical in nature
- A brief description of your problem

When you call, we log you in to our online call-tracking system, where your call is immediately visible to our support staff. We prioritize calls in the order received and track our response times. With the exception of calls flagged as Urgent, which we move to the top of the queue, we strive to contact all callers in one hour or less.

In some cases, you may already be working with someone on an issue and can only follow up with that person. Please ask for that person by name. You should be aware, however, that since your consultant may not be immediately available, your call might not be returned as quickly.

Once you place your call to Deltek, inform your receptionist that you are expecting a call from us. If you are not available when we call back, we will leave a message or voice mail to inform you that we returned your call. Your call remains in the call-tracking queue but moves to the end, as though you had just placed the call. Our return call process begins again, and our call tracking system records each attempt we make to reach you.

Who to Call

We offer three types of customer support. Please specify the type you need when you leave your message. The support types are:

- **General Support**: Most questions fall into this category. These include all Costpoint setup and operation questions and other issues that do not fit into any of the categories listed below. The support representatives handling these inquiries are experienced, management-level accountants. You can also provide your Support Receptionist with a one- or two-word description that might help direct your call, for example: "Pools/ Urgent,"or "A/P Reconciliation."
- **Technical Support**: You should request this type of support if you received an error message or are having difficulty installing a software update. If technical problems arise in the Materials Management area, you should ask your Support Receptionist to place your case in the Technical Support queue. If you are unsure which type of support you need, ask for General Support.
- **Costpoint Materials Management**: Questions relating to the Costpoint Materials Management folder (which includes the Product Definition, Bills of Material, Routings, Engineering Change Notices, Procurement Planning, Purchasing, Receiving, Inventory, Production Control, Sales Order Entry, Material Requirements Planning, Materials Estimating, and Master Production Scheduling modules) should be identified as "Materials Management General."

Deltek Web Site

Via the Deltek Customer Care Connect Web site, you can do the following:

- Download the latest versions of your Deltek products
- Search the Deltek knowledge base

- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Access information on enhancement error corrections and other technical issues
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes

You can also submit comments, error reports, and non-urgent support questions. Because Internet communication and response times can vary, you should not use the Customer Care Connect Web site for urgent support questions; please call our telephone support number instead.

To access the client support programs and information on our Web site, you must first register to receive the login and password for this area. You can register through Online Client Registration on our main Web page. You need to submit the following information for your company:

- Deltek support ID
- Contact information, including business address and, most importantly, email address
- Software/platform information

Infrastructure Consulting Group

The Infrastructure Consulting group provides a broad range of services to assist in initial setups and also in maximizing the potential of this architecture over time.

General Services

- Multiple environment deployment and configuration
- Remote user configuration
- Technical planning and reviews
- Hardware requirements analysis and selection
- Deployment planning and testing
- Client configuration and management
- Customized security setup and administration

Networks & Connectivity

- File and network operating system selection, optimization, and management
- Server-specific optimization
- Connectivity issue identification and resolution

Relational Databases

- Database selection, tuning, and optimization

- Multiple database implementation and management

Systems Integration Packages

The Deltek Infrastructure Consulting group offers standard turnkey configurations with turnkey installation, configuration, and support options. We encourage you to take advantage of our expertise in matching Costpoint to appropriate hardware and network configuration.

Deltek systems integrators are highly trained experts. In addition to recommending complete client/server configurations that best match your needs and resources, our consultants can:

- Improve the performance of your existing computing infrastructure, or
- Supply expert input for your own design and implementation planning.

Single-sourcing with Deltek means the convenience of making just one call for support, no matter what type of system help you require.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com