Deltek Costpoint CRM®

Implementation Guide

Version 6.1

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1 Introduction

In this chapter

- About This Guide
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Welcome to Deltek Costpoint CRM, the Web-based software solution for professional services organizations. Costpoint CRM combines your front-office and back-office data into one integrated system and enables all the members of your firm to use and share the same information — thereby helping increase the efficiency and productivity of your business.

About This Guide

The *Deltek Costpoint CRM Implementation Guide* contains information about configuring and setting up the various Costpoint CRM applications and features.

The contents of this guide include:

Chapter 1	Before You Begin
Chapter 2	General System and Company Settings
Chapter 3	Info Centers
Chapter 4	Set Up Work Breakdown Structure
Chapter 5	Set Up Proposals
Chapter 6	Set Up Teams
Chapter 7	Set Up Costpoint CRM Desktop and Microsoft Office Integration
Chapter 8	Set Up Security for Users
Appendix A	Auto Numbering Sources/Formats

If You Need Assistance

If you need assistance installing, implementing, or using Costpoint CRM, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal. (See "Customer Care Connect Site" below for more information.)
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- 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
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services

- Receive alerts of new Deltek releases and hot fixes

> If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. From Costpoint CRM, click **Help** on the Costpoint CRM toolbar and click **Customer Care Connect** on the menu.

   Or

   From outside Costpoint CRM, go to https://support.deltek.com.

2. Enter your Customer Care Connect **Username** and **Password**.

   If you do not have a username and password for the Customer Care Connect site, contact your firm's Costpoint CRM Administrator.

   If you forget your username or password, click the **Account Assistance** button on the Login page to get help.

3. Click **Log In.**

Deltek Costpoint CRM Help System

Costpoint CRM Help is Web-based online documentation that is fully integrated with the Costpoint CRM applications and provides both conceptual and procedural information for all areas of Costpoint CRM.

Access Costpoint CRM Help

You can access Costpoint CRM Help in the following ways:

- From any Costpoint CRM application, click **Help** on the Costpoint CRM toolbar at the top of the Costpoint CRM window.
- Click **Help** on the toolbar at the top of any Costpoint CRM form to view help for that form.
- Click the **Help** button in the lower right corner of a dialog box to view help for that dialog box.

Costpoint CRM Help Menu

When you click **Help** on the Costpoint CRM toolbar at the top of the Costpoint CRM window, this menu displays:

The Costpoint CRM Help menu provides the following options:

- **Contents —** Click this option to display Costpoint CRM Help.
- **Help Desk —** Click this option to display the Send Email dialog box. Use that dialog box to compose and send a message to a designated Help Desk mailbox. You can send email directly to Deltek Customer Care, or you can set up an internal Help Desk mailbox to respond to questions from your staff.
- **Customer Care Connect —** Click this option to display the Deltek Customer Care Connect site. This site is available as part of the Deltek Costpoint CRM Ongoing Support Plan (OSP). You must have a username and password to access this site.
- **Knowledge Base —** Click this option to display the Deltek Customer Care Connect site and go to the Knowledge Center, which provides thousands of solutions for issues and questions.
- **Contact Us —** Click this option to display the Deltek Customer Care Connect site. Select the **Contact Us** link available at the bottom of site pages to view Customer Care phone numbers, email addresses, and hours of operation. Also, you can chat with Customer Care personnel live!

About — Click this option to view application, database, and server information for Costpoint CRM.

Additional Documentation

In addition to the Costpoint CRM Help system and this guide, Deltek provides additional documentation (in PDF format) to help you install and use the Costpoint CRM application. The documentation available for this release of Deltek Costpoint CRM is listed below. Each of the guides and quick reference cards in this list is available for download from the Deltek e-Support site (except where noted).

https://support.deltek.com

- ***Deltek Costpoint CRM Implementation Guide*** — This guide contains information about configuring and setting up the various Costpoint CRM applications and features.
- ***Deltek Costpoint CRM Getting Started Guide*** — This guide contains an introduction to the Costpoint CRM Web interface and all the Costpoint CRM

applications, with tips for navigating through the system, using the dashboard, and finding and opening records.

- ***Deltek Costpoint CRM Technical Installation Guide*** — This guide contains detailed instructions for installing all the technical components of Costpoint CRM, including the servers, the database, and the application itself.
- ***Deltek Costpoint CRM Quick Reference Cards*** — The Costpoint CRM quick reference cards provide snapshots of specific business processes or Costpoint CRM forms with tips for entering data and using application toolbars. The following quick reference cards are available:
  - Create Customer from Vendor/Partner
  - Dashboard
  - Desktop and Microsoft Integration
  - Navigation Tree Designer
  - Tab Designer
  - Template Based Email
  - SF 330 Proposals
  - User Options
  - Visualizations
- ***Deltek Costpoint CRM Custom Reports and Microsoft® SQL Server Reporting Services*** — This guide provides instructions for creating, delivering, and generating Costpoint CRM custom reports with Microsoft® SQL Server® Reporting Services and its report writing tools.
- ***Deltek Costpoint CRM Document Management Technical Installation Guide*** — This guide contains detailed information on the necessary prerequisites, general configuration, and installation procedures required to use the Costpoint CRM Document Management application.
- ***Deltek Costpoint CRM Mobile Application Suite (MAS) Installation Guid***e — This guide provides instructions for enabling MAS on your Costpoint CRM server, installing prerequisite software components, and installing and configuring the MAS software. This guide also provides a list of all the mobile devices that can be used with the Deltek Costpoint CRM Mobile Application Suite.
- ***Deltek Costpoint CRMXtend Guides*** — These guides explain how to use the Deltek CostpointCRMXtend platform to integrate Costpoint CRM with other applications, access web services, implement data validation routines, and establish workflow procedures using the Microsoft .NET Framework. The following CostpointCRMXtend guides are available:
  - Deltek CostpointCRMXtend Invoking a Custom Method to Process Workflow Actions
  - Deltek CostpointCRMXtend Invoking a Web Service to Process Workflow Actions
  - Deltek CostpointCRMXtend Test Client Application for Costpoint CRM Web APIs/Web Services
  - Deltek CostpointCRMXtend Web Services and API for Deltek Costpoint CRM

1 Before You Begin

In this chapter

- ❖ Overview
- ❖ Create a Planning Team
- ❖ About the Costpoint CRM Main Menu and Applications
- ❖ About Costpoint CRM Licensed Modules
- ❖ Log on to Costpoint CRM for the First Time and Activate Modules
- ❖ Set Up User Options
- ❖ Replace Company Logo
- ❖ About Customizing Costpoint CRM

Overview

There are several actions, which are described in this chapter, that you need to take before you actually begin configuring Costpoint CRM, including:

- Creating a Planning team
- Learning about the Costpoint CRM main menu and applications
- Learning about Costpoint CRM Modules
- Logging on to Costpoint CRM for the first time
- Setting up personal options

Create a Planning Team

Deltek Costpoint CRM offers your firm the opportunity to streamline its processes and improve the quality and availability of information throughout your firm. To take advantage of this opportunity, the planning process must be thorough and recognize the needs of each group in your firm. Whether you are implementing Costpoint CRM on your own or with a Costpoint CRM consultant, strong coordination is needed to ensure that you understand and address the needs of all constituents—including marketing, administration, contract management, resource planning, and senior management.

Below is a summary of possible roles and responsibilities needed to implement Costpoint CRM successfully.

Executive Sponsor

The Costpoint CRM champion/cheerleader/enforcer, responsible for securing commitment from executive management, department/office management, marketing, and contract management.

Coordinator

The individual who coordinates the implementation of Costpoint CRM software at your firm. This role is more hands-on than the Executive Sponsor and involves making decisions about changes in policy and procedures that will enhance the value of Costpoint CRM at your firm. The Coordinator ensures that all groups' requirements have been considered in making implementation decisions.

Application Administrator

This individual develops a thorough understanding of Costpoint CRM applications throughout the implementation process, and later performs the ongoing day-to-day administration of Costpoint CRM and leads the internal training effort.

Contract Management Representative

A contract manager who acts as a liaison between Deltek, the Coordinator, and the contract management staff. This individual makes sure that the needs of contract managers are communicated to the Coordinator and taken into consideration during Costpoint CRM implementation. The Contract Management Representative works with your firm's Deltek consultant to develop and deliver training programs designed specifically for contract managers.

Information Technologies Expert

The individual responsible for all Costpoint CRM-related technology issues and tasks at your firm, including setting up data sources and connectivity, and ensuring hardware and software compatibility.

Marketing Representative

A member of your marketing group who ensures that the group's needs are understood and addressed as part of the Costpoint CRM implementation. The Marketing Representative provides input about how the CRM and qualification generation software components should be implemented, as well as identifying marketing's needs for contract information.

Resource Management Coordinator

The individual who represents the contract and resource planning needs of your firm during implementation.

Human Resources Representative

The individual who identifies the employee data that your company needs to track within Costpoint CRM.

Office/DiCostpoint CRM Administrators

Optional; dependent upon company size. These individuals work with the Application Administrator to coordinate system administration at the office level.

About the Costpoint CRM Main Menu and Applications

Costpoint CRM Applications Menu

Costpoint CRM Applications, Configuration, and Utilities are accessed through the Costpoint CRM applications menu. Each application has its own online help section that explains, in detail, how each application functions.

About Costpoint CRM Licensed Modules

Once you activate modules, the Employee Info Center will not let you add more active employees than your license dictates. For example, if you have a 150 employee enterprise license, then you cannot add more than 150 employees to Employee Info Center. There is also concurrent user based licensing for some modules. For example, if you license four Qualification users, you can only specify up to four users in Security Setup that have access to Qualifications menus.

The Deltek Costpoint CRM application is composed of two modules. Each module is described below. The function of each module (and related menu items) is explained in detail in the Costpoint CRM Help system.

Application	Description
Customer Relationship Management (CRM)	Costpoint CRM CRM provides you with a variety of options for scheduling and managing your daily activities, as well as maintaining information about your employees, clients, contacts, campaign contacts, marketing campaigns, opportunities, and contracts.
Qualifications (Custom Proposals)	Costpoint CRM Qualifications streamlines production of proposal qualifications, minimizing preparation time and improving communication across the qualifications reporting team.

Log on to Costpoint CRM for the First Time and Activate Modules

Use this procedure to log on to Costpoint CRM for the first time. This procedure applies to companies that are converting from another system (in other words, already have a populated database) and to companies that are not converting from another system (in other words, have an empty database).

When you first log on to Costpoint CRM, you need to set up your Administrative security in order to have access to and be able to configure Costpoint CRM. Costpoint CRM is installed with a single user account called ADMIN that contains a blank **Password** field. By creating a new password, you ensure system security and keep other users from logging in with Admin rights.

Once you have created an ADMIN user account and password, you can configure Costpoint CRM. However, Deltek strongly recommends that you do not set up other users' security until you have finished configuring Costpoint CRM. (Procedures for setting up other users' security are described in Chapter 8.)

To log on to Costpoint CRM for the first time:

1. Click on the Costpoint CRM icon to open the Costpoint CRM application. Costpoint CRM displays the Login form.

   Do not enter a password at this time.

2. Click **Login**. Costpoint CRM displays the Module Activation form.
3. Enter the Deltek-supplied client number in the **Client Number** field.
4. For each licensed module, enter the Deltek-supplied system level password in the **Password** field.
5. Click **OK**.
6. You now need to change your password. To do this, click **Options** from the Costpoint CRM title bar. Costpoint CRM displays the User Options form.
7. Click **Change Password**. Costpoint CRM displays the Change Password form:
8. Enter your new password in the **New Password** and **Confirm Password** fields. (Leave the **Old Password** field blank.)
9. Click **OK**.

Set Up User Options

User Options allow you to do the following:

- Change your password.
- Determine how Costpoint CRM retrieves records in lookups.
- Determine whether Costpoint CRM shows the navigational menu.
- Set the startup application.
- Set reporting/printing preferences.
- Enable/disable Activity reminders.
- Create a user name and password for Deltek's e-support site.
- Select the database that you want to use when you log on to Costpoint CRM.
- Set the “sounds the same” feature for Costpoint CRM lookups and searches.

User options are set individually, by user name, not system-wide.

To set up user options:

1. Click **Options** from the Costpoint CRM title bar. Costpoint CRM displays the User Options form.
2. Select the General tab. The General tab allows you to set up general option information.
3. Complete/modify the fields on this tab, as described below:

Field	Description
Default Country	Costpoint CRM automatically displays the Default Country selected on the Users tab of Role Security. You can override Costpoint CRM's Default Country setting by selecting a new Default Country. This drop-down lists all countries included in the Country Code Table. Select a country to use as the default when you create new Info Center records. If there are no entries in this field, then Costpoint CRM will display a message asking you to select a language from the Costpoint CRM Login screen. After you select a country, Costpoint CRM filters all States/Provinces drop-down lists based on the selected Default Country.
Automatically hide navigation menu	Select this option if you want Costpoint CRM to hide the navigational menu after you select a menu item. Otherwise, Costpoint CRM keeps the navigational menu open.

Field	Description
Find words that sound the same when performing searches	Select this option if you want Costpoint CRM to include words that sound alike in its results when performing finds and searches. For example, if you search for John Smythe, Costpoint CRM will find John Smith. Otherwise, Costpoint CRM will only include exact matches.
Automatically retrieve records when opening lookups	Select this option if you want Costpoint CRM to automatically search for all records when lookups are opened. (Note that if a lookup limit rule is in place, Costpoint CRM applies the rule when the search takes place. Lookup limit rules are set in **Configuration**, **General**, **System Settings**, Lookup tab.) See page 2-22. This option is only available if the option **Allow users to automatically retrieve records in lookups** is selected. This option is set in **Configuration**, **General**, **System Settings**, Lookup tab. See page 2-22.
Automatically retrieve your record in Employee Info Center/Employee Review	Select this option if you want your employee record to be automatically loaded when you go to Employee Info Center. This option is related to the feature which allows employees to update their own employee record. For more information about this feature in Employee Info Centers, see the Employee Info Center Tool Bar topic in the Costpoint CRM Online Help system.
Change Password	Click on this button to change your password. Costpoint CRM displays the Change Password form. Enter your old password, your new password, and confirmation of your new password. Then click **OK**.

4. Select the Startup tab.

   The Startup tab allows you to determine what appears when you start up Costpoint CRM and whether you want Costpoint CRM to remember the size and position that you specified for windows and reports.

5. Complete/modify the fields on this tab, as described below:

Field	Description
Startup Application	Select one of three options: • **Blank Page**. A blank page (or a company "cover" page if your company has set one up) appears when you log into Costpoint CRM. • **Dashboard**. Your personal dashboard appears when you log into Costpoint CRM. • **Selected Application**. When you select this option, the **Selection** button becomes enabled, which lists all the menu items on the Costpoint CRM main menu. Select the item that you want to appear when you log in.
Remember window sizes and positions for Costpoint CRM screens and reports	This option determines whether you want to save the size and position of the Costpoint CRM login window, the main Costpoint CRM window, or a Costpoint CRM report window to the size and position that you specified for that report or window. For example, if you changed the size and position of the main Costpoint CRM window using the double arrow tool and/or arrow, and this option is selected, the next time you open the window, Costpoint CRM will remember the size and position you specified. If you do not select this option, Costpoint CRM opens these windows/reports at 800 x 600, regardless of whether you previously resized them.
Default Database	Select a default database to connect to when you log into Costpoint CRM.

6. Select the Reporting tab.

   The Reporting tab allows you to set your default printer, set your default font, determine page size and margins, and activate progressive viewing.

7. Complete/modify the fields on this tab, as described below:

Field	Description
Default Printer	Select the default printer that Costpoint CRM will use when printing reports. Only those printers for which you have security access are listed.
Default Font	Select the font that Costpoint CRM will use as a default for all reports, including reports that do not have option pages. Note that you can still override this default on reports that have option pages.

Field	Description
Unit of Measure	From the drop-down list, select the unit of measure (**Inches** or **Millimeters**) to use when you enter the following measurement fields on this tab: • **Top Margin** • **Bottom Margin** • **Left Margin** • **Right Margin** • **Width** • Height
Page Size	From the drop-down list, select the default page size for Costpoint CRM reports for a user. The options are: • **Letter** • **Legal** • **Ledger** • **Tabloid** • **A4** • **A3** • **Executive** • **Custom** The width and height of the page size that you select in this field display in the **Page Width** and **Page Height** fields in the grid. When you select the **Custom** size, the **Page Width** and **Page Height** fields are enabled so you can enter a width and height of your choice. The page size entered in this grid prefills on the Reporting tab of User Options, which users can modify. Users can also modify the page size of a report on the Layout tab of the Options form (for reports that have options) before they print the report. For mailing label reports, the page size is on the General tab.

Field	Description
Margins	**Top**, **Bottom**, **Left**, and **Right** Set the default top, bottom, left, and right margins for all Costpoint CRM reports. This includes reports that do not have option pages, such as transaction lists or posting logs. Enter inches or millimeters based on which one you entered in the **Unit of Measure** field on this tab. The margin settings that you enter in these fields prefill in the margin setting fields on the Layout tab of the Options dialog box for reports that have options. For mailing label reports, the margin settings are on the General tab. You can modify the settings on the Layout or General tab before you print a report.
Dimension Width and Height	These fields display the page width and height for reports based on what you enter in the **Page Size** field. The page width and height measurements display in either inches or millimeters based on which one you selected in the **Unit of Measure** field. The page size dimensions (width x height) in inches are as follows: Letter — 8.5 x 11 Legal — 8.5 x 14 Ledger — 7 x 11 Tabloid — 11 x 17 A4 — 8.3 x 11.7 A3 — 11.7 x 16.5 Executive — 7.25 x 10.5 Custom — Enter the width and height of your choice.

Field	Description
Dimension Width and Height (cont.)	**Millimeters** The page size dimensions (width x height) in millimeters are as follows: Letter — 216 x 279 Legal — 216 x 356 Ledger — 432 x 279 Tabloid — 279 x 432 A4 — 210 x 297 A3 — 297 x 420 Executive — 184 x 267 Custom — Enter the width and height of your choice.

8. Select the Activity tab.

   The Activity tab allows you to enable e-mail and/or popup reminders. You can choose to get either an e-mail or a pop-up for an activity reminder (or you can choose to get both). For additional information about activity reminders, see Activity Reminders Overview in the Costpoint CRM Help system.

9. Complete/modify the fields on this tab, as described below:

Field	Description
Enable email reminders	Select this option if you want Costpoint CRM to send you e-mail activity reminders. An e-mail reminder for an activity is sent to the e-mail address specified in your Employee Info Center record at the reminder time specified for the activity. To receive an e-mail reminder, you must select the **Reminder** option on the Detail tab of the Activities dialog (refer to the Costpoint CRM Help system, Calendar and Activities for more information). You can select this option (and specify when you want to receive the reminder) when you schedule the activity, or at any time prior to the date the activity occurs. Note the following: • You do not have to be logged on to Costpoint CRM to receive an e-mail reminder — e-mail reminders are sent from the Costpoint CRM server. • You can choose to get either an e-mail or a popup reminder (or you can choose to get both).
Enable popup reminders	Select this option if you want Costpoint CRM to send you popup activity reminders. A popup reminder for an activity displays on your screen at the reminder time specified for the activity. To receive a popup reminder, you must select the **Reminder** option on the Detail tab of the Activities dialog (refer to the Costpoint CRM Help system, Calendar and Activities, for more information). You can select this option (and specify when you want to receive the reminder) when you schedule the activity, or at any time prior to the date the activity occurs. Note the following: • You must be logged on to Costpoint CRM to receive a popup reminder. If you are not logged on to Costpoint CRM when a popup reminder is sent, the reminder will display the next time you log on. • You can choose to get either an e-mail or a popup reminder (or you can choose to get both).

10. Select the Support tab.

    The Support tab allows you to enter your user name and password for Deltek's e-support site. For information about Deltek's e-support site and other Deltek Support options, see the Introduction to this guide.

11. Complete/modify the fields on this tab, as described below:

Field	Description
Username	Enter your username for Deltek's e-support site, up to twelve characters. This is the same username that you created for the e-support site.
Password	Enter your username for Deltek's e-support site, up to twelve characters. This is the same password that you created for the e-support site.

12. Select the Mobile tab. This tab is only available if your company uses the Mobile Application Suite. The **Timesheets and Expenses Reports** section of the tab does not apply to Costpoint CRM users.

    The Mobile Tab enables you to select activities, customers, contacts, and opportunities to download to your mobile device.

13. After you make your selections from the CRM drop-down lists, click **Save** or **Save and Log Off**..

Replace Company Logo

You can replace the Deltek logo in Costpoint CRM with your own company logo (or any other image that you create) by following the directions below. This is a system-wide setting; not by individual user.

To change the logo:

1. Create a .gif file of your corporate logo and name it deltek.gif. (The pixel size should be approximately 116 width and 34 height.)
2. Go to C:\ Program Files\Deltek\Costpoint CRM\Web\Images and rename the existing deltek.gif to deltek.old.
3. Copy your new deltek.gif file into this folder.
4. The next time you logon to Costpoint CRM, your new logo will appear on the screen.

Notes:

- You will need to redo this process after every Costpoint CRM installation, as the installation overwrites the file.
- End users may need to clear their browser cache to see the updated image. To do this, go to Internet Explorer and select **Internet Options** from the **Tools** menu. On the General tab, Temporary Internet files, click **Delete Files**. Then restart Internet Explorer.

About Customizing Costpoint CRM

Deltek offers you many ways to customize Costpoint CRM to better suit your firm's needs, on both a business logic and functional basis, including:

- Changing the names of fields to confirm with your industry's terminology.
- Adding and changing tabs and fields in Costpoint CRM Info Centers and Activity dialogs.
- Customizing reports, both in how they look and how they behave.
- Creating workflows, which perform actions when an event in an Info Center occurs.
- Creating alerts to move information along and to ensure business standards are followed.
- Creating online help topics.
- Writing custom programs that extend the business logic of the standard applications.

Some of these features are set up on a system-wide level; others can be set up on an individual level. Some of these features allow you to customize the way Costpoint CRM looks; others allow you to customize the way Costpoint CRM behaves.

All these customizing features are included as a standard part of Costpoint CRM, at no cost to you; however, certain Workflow actions require programming knowledge. For these, Deltek offers support on a time and materials basis.

User Defined Tabs

The User Defined Tabs application allows you to customize your Info Center tabs to better suit your firm's needs. Before you begin adding new tabs, carefully determine what information you need to gather that is not captured elsewhere in Costpoint CRM. Also consider how you want this information grouped.

With the User Defined Tabs feature, you can:

- Add new tabs, fields, and grids.
- Change the names and order of fields on tabs.
- Change the order of tabs.

See “Mobile Application Suite Settings” on page 48 for more information.

Screen Designer

The Screen Designer allows you to design your own tabs in any of the Costpoint CRM Info Centers and Activities dialogs.You open up the tab in “design mode” to perform a variety of actions. This combination of design options allows you to tailor your firm's information to meet the security and information requirements of each user.

With the Screen Designer, you can:

- Rearrange or resize existing fields and labels.
- Change existing field or and add new ones.
- Move or change the captions on grids.
- Determine whether fields should be hidden or locked, based on Security role.
- Determine whether fields are required.

You can also use the Designer to create custom field and tab level help topics for Info Center tabs.

See “Screen Designer” on page 113 for more information.

Navigation Tree (Application Menu) Designer

The Navigation Tree (also refered to as the Application menu) Designer allows you to custom design your Costpoint CRM navigation tree.

With the Navigation Tree Designer, you can:

- Rearrange menu items, at both the top and sub levels.
- Add new menu items, including http pages, reports, and Web Outlook.
- Indent or outdent menu items.
- Delete user-defined menu items.

See the Navigation Tree Designer Overview in the Costpoint CRM Online Help system for more information.

Field Labels

The Field Labels feature allows you to rename key fields, such as Contract or Customer to reflect the terminology used in your industry or firm. For example, a law firm may use “Matter” instead of “Contract.” Costpoint CRM then uses your new field names throughout the system (on screens, reports, and so on).

See “Set Up Field Labels” on page 29 for more information.

Reports

Deltek Costpoint CRM's standard reports have been designed to meet most of your business needs. In some cases, however, you may need something different in a report. Costpoint CRM offers a wide-range of customizing options to help you meet these needs, including the following:

- Modify report columns, format text, set margins, or create graphs using the Options tabs within Costpoint CRM Reporting. See Reports Formatting Overview in the Costpoint CRM Help system.

- Create options for custom reports. See Custom Report Options Overview in the Costpoint CRM Help system.
- Create user-defined calculations using any of the existing numeric columns available for a given report. See “Create Calculated Fields” on page 84.

Alerts and Workflows

Alerts and Workflow are two powerful features that allow you to automate simple and multi-stage processes and keep all interested parties informed and engaged.

For example, you can define an alert so that a project manager will be informed when new contracts are added. Or, you can define a workflow so that when an opportunity record is changed from Pending to Awarded status, the workflow will trigger a series of actions, such as creating a new project, e-mailing the project accountant, and setting up a meeting.

See “Set Up Alerts” on page 88 (with additional information in the Costpoint CRM Help system) for more information.

Lookup/Report Labels

If you change field names on standard tabs, Costpoint CRM allows you to create custom lookup lists and report labels to reflect these changes, including:

- Lookup search types labels
- Generic lookup search type labels
- Report column labels
- Report group labels

See “Create Merge Templates” on page 68 for more information.

Note that report labels can also be changed within the individual report settings. See Report Descriptions Overview in the Costpoint CRM Help system; then select the report to which you want to make changes.

Code Tables

Code Tables allow you to custom populate many drop-down lists with standard values for many of Costpoint CRM's Info Center fields. The values can be used to save time during routine data entry or to enforce uniformity in these data fields.

For example, for the Employee Role field on the Contracts tab of Employee Info Center, you can use a table to define the roles that your employees may have on new and existing projects at your firm, such as Architect, Project Manager, and Supervisor.

See “Set Up Code Tables” on page 66 for more information.

Dashboard Configuration

The Dashboard is your "portal" into Deltek Costpoint CRM, allowing you to create a personalized view of your business world. By combining information drawn from different areas of Deltek Costpoint CRM you can design a single Web page that brings together all of the information and tools that you rely on most.

For example, you can:

- Drag and drop your dashparts anywhere on the Costpoint CRM screen.
- Resize, hide, rename, or change the color of your dashparts.
- Create individual URL dashparts for your Dashboard.

See the Costpoint CRM Help system for more information.

User Options

User Options allow you to do the following on an individual (by username) basis:

- Set startup and viewing options.
- Change your system and e-support passwords.
- Determine lookup and search options.
- Enable/disable Activity reminders.
- Set reporting and printer preferences.

See "Set Up User Options" on page 8 for more information.

2 General System and Company Settings

In this chapter

Set Up General System Settings

System Settings allow you to define certain overall features of your system, including lookup list options, e-mail options, and server options, among others.

Set Up Lookup List Options

Lookup lists are available whenever you see 🔍 in the upper right corner of a field.

Lookup lists allow you to locate a record or group of records that share a specific type of data. For example, you could use a lookup list to search for all of your contacts that live in a particular state, or find all your contracts with similar types. Also, you could access a single record, such as an employee, using a specific employee number. Lookup list search options are specified at the user level.

The Lookups tab of System Settings allows you to determine certain options in lookup lists and dashboard lists

For more information about lookup lists, see the Getting Started book in the Costpoint CRM Help system.

To set up lookup list options:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Setup form.
2. Select the Lookups tab.
3. Complete the fields on this tab, as described below:

Field	Description
Allow users to automatically retrieve records in lookups	If this option is selected, Costpoint CRM controls whether records are automatically retrieved when lookups are initially opened. If the option is not selected, Costpoint CRM does not retrieve records automatically in lookups. If this option is selected, you can now determine whether to automatically retrieve records when opening a lookup. To do this, click **Options** from the Costpoint CRM title bar, select the General tab, and select the **Automatically retrieve records when opening lookups** option. If your company has a large database, you may not want to select this option since retrieving records may take some time.

Field	Description
Use lookup limits	Select this option to place a limit on the number of records Costpoint CRM will retrieve in a lookup. If your company has a large database, you may want to limit the number of records Costpoint CRM retrieves, because retrieval may take some time. If you selected this option, use the **Maximum number of records** field to enter the maximum number of records you want Costpoint CRM to retrieve.
Maximum number of records	If you select the previous option, use this field to enter the maximum number of records you want Costpoint CRM to retrieve.
Use Dashboard lookup limits	Use this option to limit the number of records you want to display on your dashparts. When you set this limit, you click on the dashpart's **Next X Records >>** or **<<Previous X Records** to view the next or previous group of records (**X** represents the number you select in the next field). If you selected this option, select the maximum number of records in the **Maximum number of Dashboard records** field.
Maximum number of Dashboard records	If you selected the previous option, enter in this field the number of maximum records to allow. For example, if you enter a limit of 5 and a user has 10 records in a dashpart, only 5 will display at a time. The number you select is the same number for all your dashparts that use records.
Grid View Settings This option applies to the Info Center grid view feature. For information about this feature, see the Info Center View topic in the Costpoint CRM Online Help system.	
Maximum fields selected	Select the maximum number of fields that you want to be able to see in the grid view of Info Centers. In Info Centers, you select any of the fields that you want included in the grid view up to this number. The default is 15.

4. Click **Save**.

Set Up E-mail Preferences

The Email tab of System Settings allows you to configure system-wide e-mail options. You identify your company's e-mail servers and passwords so Costpoint CRM can send you e-mails for alerts, errors, etc.

To set up e-mail preferences:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Email tab.
3. Complete the fields on this tab, as described below:

Field	Description
Email Server	Enter the host name or IP address of an SMTP-compliant e-mail server.
Port	Enter the SMTP port that the SMTP server that you entered above uses. The default is port 25.
Default Sender	Enter the default e-mail address that you want to use when e-mails are sent by the system. Costpoint CRM also uses this address if the employee sending the e-mail from within Costpoint CRM does not have an e-mail address associated with him/her.
Use Default Sender for Default Reply To	Select this option if you want the Reply e-mail address (the address that appears when you click **Reply**) to be the same as the e-mail address you entered in the **Default Sender** field. Do not select this option if you want the Reply address to be different than the address you entered in the **Default Sender** field. In this case, enter the address that you want in the **Default Reply To** field.
Default Reply To	Enter a default Reply e-mail address that will automatically appear when you click **Reply**.
Default Help Desk	Enter the e-mail address that you want to use when you click the Help Desk e-mail link from the Help menu. Use this address to centrally collect all support-related issues.
Username	If your SMTP server requires domain authentication, enter the authenticated username in this field. (This is a domain username, not a Deltek Costpoint CRM username.)
Password	If your SMTP server requires domain authentication, enter the authenticated password (that matches the domain username above) in this field. (This is a domain password, not a Deltek Costpoint CRM password.)

Field	Description
Costpoint CRM URL	Enter your company's entire URL.For example http:// Costpoint CRM.deltek.com. This field is required if you want alert e-mails to work within Costpoint CRM.

4. To check your settings and send a test e-mail to the default help desk that you specified, select the **Send Test Email to Default Help Desk** option.
5. Click **Save**.

Set Up Server Options

You can define multiple process queues, each of which may be monitored by individual process servers simultaneously.

A process queue is a named waiting list to which you can submit Costpoint CRM functions or processes. When the system administrator starts the process server on a workstation running Costpoint CRM, a process queue is assigned to the process server. Processes "waiting" in the queue are then run, in the order scheduled, by the process server.

If you modify a process queue that is currently running or paused (that is, the process queue is assigned to a process server), Costpoint CRM will not reflect changes to the queue setup until the next poll of the process queue by its associated process server.

After you establish a process queue, you can only delete it if the queue is stopped and there are no process entries in the queue.

For more information about the Process Server utility, see the Utilities book in the Costpoint CRM Help system.

To set up server options:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Servers tab.
3. You can do the following:
   - To add a new process queue, Actuate report server, or application server, click **Insert** within the appropriate grid. Costpoint CRM adds a blank row, in which you can enter the name of the queue or server.
   - To delete an existing queue, click **Delete**.
   - To pause or continue a process queue, select the queue and click **Pause** or **Continue**. Costpoint CRM updates the status in the **Status** field.

4. Complete the fields on this tab, as described below:

Field	Description
Retain job history for x days	This field indicates whether or not Costpoint CRM saves history for completed processes in the queue. The default for this field is to retain process history. If you are not retaining process history, Costpoint CRM deletes process entries from the queue after they have completed running, have failed, or have been cancelled. If the process entry has an alert pending, Costpoint CRM deletes the process entry after the submitter has been notified. If you are retaining process history, Costpoint CRM deletes process entries from the queue after the specified number you enter in the **Retain history for x days** field. If the job has an alert pending, Costpoint CRM deletes the process entry after the specified number of days and only after the submitter has been notified. Enter the number of days to retain process history. The default number of days to retain history is 7. Deltek strongly recommends that you *do not* enter zero (0), because this would save the reports indefinitely.
Retain Errors for x days	This option allows you to set a limit on the number of days that the server retains error reports for successful runs. Deltek strongly recommends that you *do not* enter zero (0), because this would save the reports indefinitely.
Process Queues	
Name	Required. Enter a name by which to identify this process queue, using up to 40 characters of free text. The queue name should be descriptive. This name appears wherever process queue information is displayed and may be selected.
Dedicated Server	If you want to dedicate a queue to a specific server, select the server from the drop down list. Only that process server will run jobs on that queue. This is useful if you want a particular machine to run jobs of a particular type. For example, you may want all large jobs to run on the most powerful machine.
Max	Enter the maximum number of jobs that will run concurrently in this queue, regardless of how many jobs are actually in the queue. Enter zero for no limit.
Priority	Enter the priority of the process queue, zero (0) being the highest priority.

Field	Description
Status	Displays the status of the queue, either Running or Stopped. Status is determined by whether you click **Pause** or **Continue**.
Application Servers	
Server Name	Names of the application servers.

5. Click **Save**.

Set Up Field Labels

The Labels tab of System Settings allows you to rename key fields, such as Contract, Phase, and Task, to reflect the terminology used in your industry or firm. For example, a law firm may use “Matter” instead of “Contract.” Costpoint CRM then uses your new names throughout the system on screens, reports, and so on.

To set up field labels:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Labels tab.
3. Complete the fields on this tab, as described below:

Field	Description
System Label	The system labels are display-only. These are the initial Deltek field names. You will notice that many fields have already been customized in the Costpoint CRM application. You may modify any label as desired.
Label	Enter the name of the label that you want to use. Note that depending on the length of the label, it may wrap to a second line on reports.
Gender	Use the Gender field to specify the gender or article necessary for the label. For example, Spanish has a masculine gender that uses el for the word the and feminine nouns use la.
Leading Vowels	Use this option to select the article to use before the noun. For languages that do not treat words with leading vowels different, the Leading Vowel check box will not affect the use of the article.

4. Click **Save**.

View Numbering Structure

Costpoint CRM is shipped with a numbering structure (Contract, Phase, Task, Employee, Customer, and Vendor/Partner). During installation you may have modified this structure. The Numbering tab of System Settings lets you view the format currently set up for your firm.

The information regarding the length and format of your key fields cannot be modified from this tab — it is read only. To change numbering lengths and formats, use the Key Conversion and Key Format utilities.

For more information about these utilities, and information about numbering lengths and formats, see the Utilities book in the Costpoint CRM Help system.

Auto Numbering Feature

The Numbering tab also allows you to automatically generate an identification number for new records created in the Projects, Employees, Vendors, Clients, Opportunities, and Marketing Campaigns info centers. See the Set Up Auto Numbering section, following this section, for information.

To view the numbering structure:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Numbering tab.
3. Review numbering formats, as needed.

Set Up Auto Numbering

Costpoint CRM includes an auto numbering feature that automatically generates an identification number for new records created in the following Info Centers:

- Contracts
- Employees
- Vendor/Partners
- Customers
- Opportunities
- Marketing Campaigns

You can define the structure of these identification numbers to match your firm's business requirements. When auto numbering is enabled, Costpoint CRM generates the number when the new record is created using one of the following functions:

- Clicking **New** from the Dashboard.
- Copying another record.
- Using the **New** button from a different Info Center. (For example, a new customer is added from within the Contract Info Center.)
- Using a template.
- Copying an opportunity to create a project.

After creating the new record, **Auto Number** displays in the **Number** field for the record within the Info Center. You can only change this number if the **Allow Override of Auto Number** option is selected on the Numbering tab of General System Settings.

Example of How to Use the Auto Numbering Feature

To use the Expression Configuration dialog to create new identification numbers based on existing fields in the selected info center, you could format the fields as shown below.

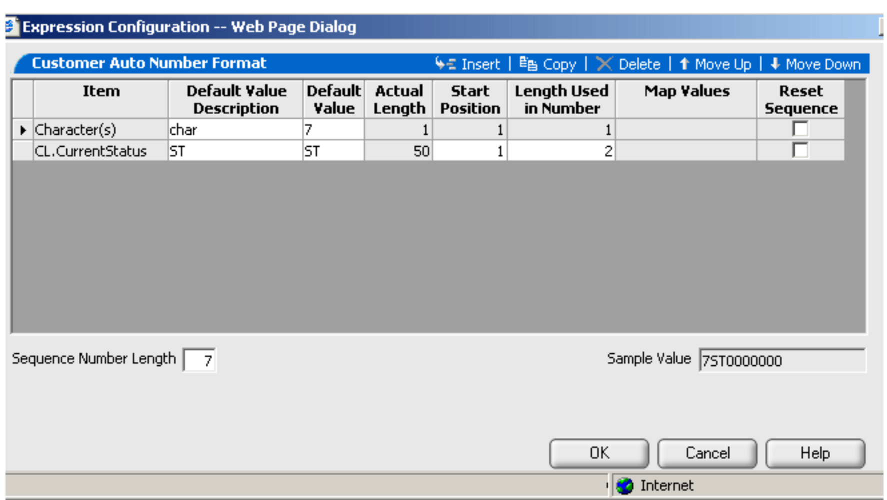
For the first row on the Customer Auto Number Format dialog:

- Item = Character
- Default Value = 7
- Actual Length = 1
- Start Position = 1
- Length Used in Number = 1

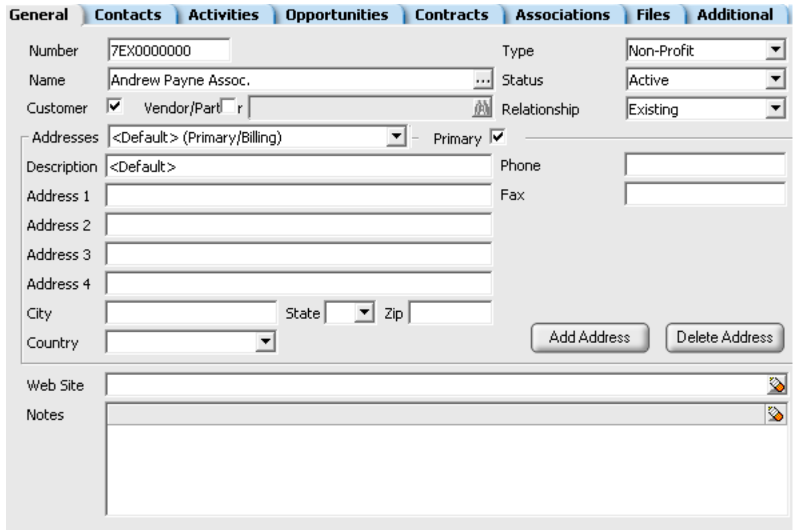
The first digit in the Sample Value displays as 7. Then, when you set the second row on the Customer Auto Number Format as follows:

- Item = CL.CurrentStatus
- Default Value = ST
- Actual Length = 50
- Start Position = 1
- Length Used in Number = 2

The second digit in the Sample Value displays as ST, because the length is “2” and the start position is “1”, which puts it immediately next to the first digit as entered in the first grid row.



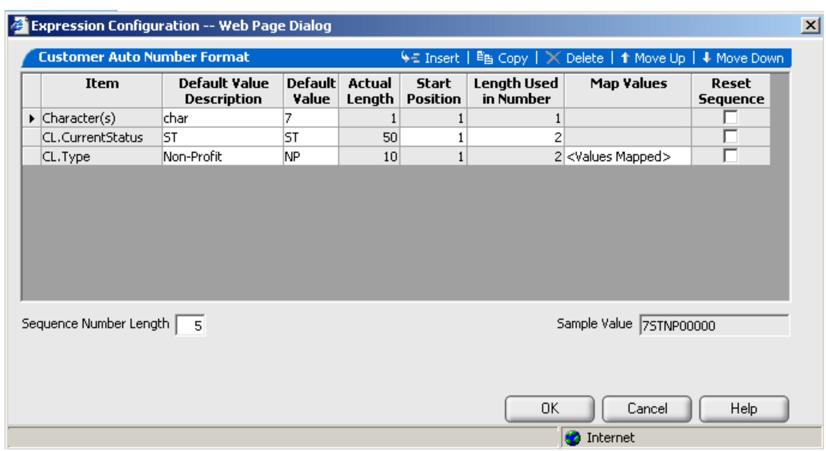
This would translate Costpoint CRM creating the number for a new Customer Info Center record as follows:



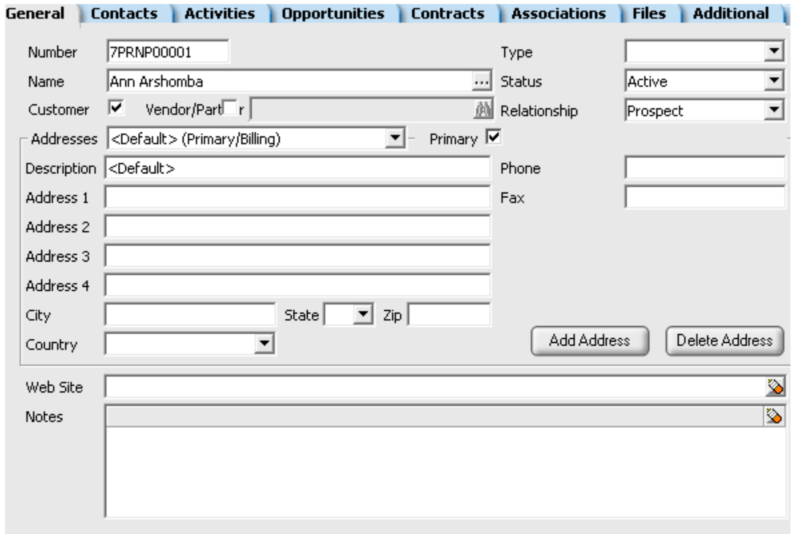
The Number field is auto populated as **7EX0000000** because:

- **7** is the Default Value for the character field.
- **EX** is the status (Existing) from the Customer Current Status field. The default value changed from ST to EX because there was a value entered in the Relationship field. If no value were entered, the number would have been **7ST0000000**.

And, if you then modify the Expression Configuration dialog to insert a third format as follows:



And then generate a new customer record:



Costpoint CRM generates the auto number to reflect the additional field on the expression dialog, which includes mapped values. The Number field is auto populated as **7PRNP00001** because:

- **7** is the Default Value for the character field.
- **PR** is the status (Prospect) from the Client Current Status field.
- **NP** stands for Non Profit, which is the Mapped Value.
- **1** is in the fifth position because the Start Position is set to 5.

After creating the new record, **Auto Number** displays in the **Number** field for the record within the Info Center. You can only change this number if the **Allow Override of Auto Number** option is selected on the Numbering tab of General System Settings.

If Costpoint CRM is configured to use the auto numbering feature, you cannot enter a number in the **Number** field. Instead, [**AUTONUMBER]** displays in this field when you save the form.

Synchronize Customer Information

If the Synchronization module is installed on your system, the Synchronization tab is available. The Synchronization module allows you to synchronize customer (company) information that is linked to contacts coming from Microsoft® Outlook/ Exchange or Lotus Domino.

All references to Customer on the Synchronization tab are using system-wide labels; however, references to Contact are not. The term Contact is generic to both Costpoint CRM and the mail server (Microsoft® Outlook/ Exchange or Lotus Domino).

Synchronization and Security

For a Costpoint CRM user to be able to synchronize contact, appointment, and task information with Exchange, the system administrator must use Costpoint CRM Security to first associate the user with an Employee record. After this association is established, the user will automatically have access to data that synchronizes between the two applications. For more information, see "Create Users and Passwords" on page 196.

For more information about using the Synchronization feature, see the Data Synchronization and Microsoft Outlook book in the Costpoint CRM Help system.

To set synchronization options:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Synchronization tab.
3. Complete the fields on this tab, as described below:

Field	Description
Customer information linked to Contacts	

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Field	Description
Add a new Customer, if incoming Contact's company name does not match with the existing Customer names in Costpoint CRM	Contacts in Microsoft® Outlook/Exchange have a Company-Name, which is analogous to the name of the customer in Costpoint CRM to which the contact is attached. To associate an incoming contact with a customer, Costpoint CRM matches the Company-Name of the contact with the names of existing customers in the database. If a match is not found and the above option has been checked, a new customer record will be added to Costpoint CRM on the fly and the contact will be associated with it. If this option is not selected, the contact will still be added to Costpoint CRM, but with no customer association.
Default Customer Type	This option allows you to select a default customer type which will be applied to new customer records when those records are created during synchronization. Your options are Commercial, Federal Government, Local Government, Non-Profit, Private, and State Government. This option is only available if you selected the previous option.
Add a new Customer address, if incoming Contact's business address does not match with the existing addresses of the Customer in Costpoint CRM	The business address of a contact in Costpoint CRM is simply the address of the customer to which the contact is linked. When incoming contacts' business address information is processed, it is compared with the existing addresses of the customer in Costpoint CRM that the contact is linked to (comparison is only with respect to city, state and zip). If there are no matches and this option is selected, a new address is added to the customer with the address-description set as "<City>, <State> <Zip>". If this option is not selected, contacts will still be added but there won't be any customer-address (business address) assigned to them in Costpoint CRM.
Include Address1 information (in addition to City, State, and Zip) for comparison of Customer address with Contact's business address	Select this option if you want Costpoint CRM to include the Address1 field (along with the City, State, and Zip that are currently being used) for comparison of customer address with incoming contacts' business address. Note that if this option is selected, the Address 1 information needs to be an exact match with what is in Costpoint CRM; any variations, such as an extra space or a period, will make the comparison fail and may result in duplicate addresses for customers. This option is unselected by default.

Field	Description
Employee and attendee names	
Include Employee middle name for comparison with user names (full name) from groupware servers (MS-Exchange/Lotus-Domino), while resolving attendee names for appointments/ meetings/tasks	Select this option if you want Costpoint CRM to include the employee middle name for comparison with names from Microsoft® Exchange/Domino servers. Depending on how the user names are set up in either system, this option will ensure a match, especially if middle names are not consistent between Costpoint CRM and the groupware servers. The default is Y (selected).

4. Click **Save**.

Enable Audit Trail

The Info Center Audit Trail Reporting feature allows you to keep track of changes made to your Info Center records. Audit trails are triggered when users perform update, delete, and insert actions on your Info Center records.

Auditing keeps track of:

- The original value and the new value of the change.
- The user who changed the value.
- When the change was made.

Auditing also applies to Info Center custom tabs and fields. Costpoint CRM supports audit trail reporting at both the record level and the field level. You can view audit trails (by record type) by selecting the appropriate audit trail report from the Costpoint CRM Reporting application or by printing the report from within the Info Center.

- Audit reports display record names, actions performed, user names, and dates.
- Audit detail reports display actions performed, and old and new data values by column.

For a complete list of audit reports, see the Index of Reports in the Costpoint CRM Help system

Before you can access the audit trail reports, your system administrator must enable the Audit Trail feature. Enabling the audit trail also allows you to determine for how long the audit trail should be kept. If audit actions are not performed during the period you enter here, they are kept until you next perform an audit action.

For example, if you enable auditing and then enter 14 for the number of days you want to retain auditing, and an audit action isn't performed for 21 days, Costpoint CRM retains the audit trail for 21 days.

- Audit reports do not appear in the Report list if auditing is disabled. If you enable Auditing, you need to log off and then log on, for the change to take place and for the reports to appear in the list.
- Enabling Auditing may cause performance issues of numerous changes are being made.
- Costpoint CRM automatically disables Auditing while the Batch Deletes utility is running.

To enable the Audit Trail:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Setup form.
2. Select the Audit Trail tab.
3. Complete the audit trail fields on this tab, as described below:

Field	Description
Enable Audit Trail	Select this option to enable Info Center auditing.
Number of days to retain audit history	If you selected the option above, enter the number of days that you want Costpoint CRM to retain Info Center audit trails.
Applications to Audit	Select the applications that you want to audit. The applications that appear depend on the modules that you own.
Audit only key fields when deleting main records	The Audit Trail feature has the ability to track only key values for deletes of main records from Info Centers. If you select this option and a main Info Center record is deleted (e.g., an Employee), then only select columns will be tracked. If you do not select this option, then all columns of the main record and all rows of all subsidiary tables will be tracked.

4. Click **Save**.

Set Up Alerts Polling Interval

The alerts polling interval allows you to specify how often, in seconds, Costpoint CRM checks for alert activity.

This polling interval applies only to CRM activity alerts. For all other alerts, the polling interval is system-set.

Activity alerts are a Costpoint CRM workflow function designed to remind you when your opportunities advance from one stage to the next of calendar events, contract tasks to be assigned or approved, and the need to submit timesheets, expense reports, and contract budgets. See "Set Up Alerts" on page 88 for more information.

The value you enter here must be greater than 0. The recommended value is 60, but may be higher according to need.

To set up the alerts polling interval:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Miscellaneous tab.
3. Complete the polling interval field on this tab, as described below:

Field	Description
Polling interval for activity alerts (seconds)	Enter the polling interval in seconds. The value you enter must be greater than 0. The recommended value is 60 but may be higher according to need.

4. Click **Save**.

Allow Calendar Sharing

The Calendar Sharing feature allows you to share your Activity Calendar with other users at your firm.

This feature allows you to specify the users with whom you want to share your Activity Calendar and to specify each users' access rights to your Activity Calendar. Those users can then open and view your Activity Calendar using the Calendar and Activities application.

If you select the **Allow users to share calendars** option, three additional fields appear on the Calendar View menu: **Share Calendar**, **Open Calendar**, and **My Calendar**.

For more information about the Activity Calendar and these fields, see the Calendar and Activities book in the Costpoint CRM Help system.

To allow Calendar sharing:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Miscellaneous tab.
3. Complete the calendar sharing field on this tab, as described below:

Field	Description
Allow users to share their calendar	Select this option to allow calendars to be shared and viewed by other users. This option is only available if the CRM application is installed. This option is selected by default.

4. Click **Save**.

Enable Workflow Log

Workflows allow you to create conditions within Info Centers for which you want to be alerted. With workflows you can totally automate the process of being alerted each time a specific action takes place, creating a timelier, more collaborative, and accurate completion of tasks.

This option allows you to determine whether you want to keep a log of workflow actions, and for how long the actions should be kept. The log records workflow execution progress, such as when events start, and when individual actions succeed, fail, or are not executed because of the conditions defined are not met. This option is mainly used as a troubleshooting tool in determining why workflow alerts do or do not work correctly.

Note that if workflow alerts do not occur during the period you enter here, they are kept until Costpoint CRM does generate a workflow alert. For example, if you enable the workflow log and then enter 14 for the number of days you want to retain workflow alerts, and a workflow doesn't occur for 21 days, Costpoint CRM retains the alert for 21 days.

To enable the workflow log:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Miscellaneous tab.
3. Complete the workflow fields on this tab, as described below:

Field	Description
Enable Workflow Log	Select this option to enable Workflow log.
Number of days to retain workflow log	If you selected the Enable Workflow Log option, enter the number of days that you want Costpoint CRM to retain workflow actions.

4. Click **Save**.

Authentication for Internet Access

If your company requires credentials for Costpoint CRM to access the Internet (HTTP), you need to fill in the three Authentication fields on the Miscellaneous tab. For setups that do not required authentication to access the Internet, leave these fields blank.

Note that some networks cache these credentials, so that once one successful request has been made, changing these fields to invalid values may still allow calls to succeed for some time.

To authenticate Internet access:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Miscellaneous tab.
3. Complete the Internet authentication fields on this tab, as described below:

Field	Description
Internet Authentication Domain	If your company requires credentials for Costpoint CRM to make an Internet (HTTP) call, enter the authentication domain name.
Internet Authentication Username	If your company requires credentials for Costpoint CRM to make an Internet (HTTP) call, enter the authentication username.
Internet Authentication Password	If your company requires credentials for Costpoint CRM to make an Internet (HTTP) call, enter the authentication password.

4. Click **Save**.

Set the Default Fonts for the Text Editor

The system administrator can set the default font and size that the Text Editor uses when you enter text in a memo, comment, note, description, or proposal field. The default settings are also used in reports that include these fields.

Selecting a new default font and size does not change any *existing* text in these fields. The new font and size applies only to text you enter in these fields after you make the default font and size change.

You can still change the font or size for a specific text field by opening the Text Editor in that field and changing the font or size for the specific entry.

For more information about the Text Editor, see the Text Editor Overview topic in the Costpoint CRM Online Help system.

To set default fonts for the Text Editor:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Miscellaneous tab.

3. Complete the Text Editor fields on this tab, as follows:

Field	Description
Font/Size	Select the font and size that you want to use as defaults for the Text Editor. You have the following options: **Fonts**: Arial, Courier New, Tahoma, Times New Roman **Sizes**: 8, 10, 12, 14, 18, 24, 36

4. Click **Save**.

Enable Instant Messaging

Smart Client technology enables the integration between Costpoint CRM and Microsoft Office Communicator, allowing you to quickly contact employees who are logged in to Costpoint CRM.

To enable instant messaging:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Miscellaneous tab.
3. Complete the enable instant messaging field on this tab, as described below:

Field	Description
Enable Instant Messaging	Select this option to enable the instant messaging feature within Costpoint CRM. See "Send an Instant Message or Email Overview" in the Info Center section of the Costpoint CRM Online Help system for more information about this feature.

4. Click **Save**.

Create Default Location for MODI Attachments

Costpoint CRM Microsoft Office and Desktop Integration (MODI) allows you to integrate Costpoint CRM information with Microsoft Word, Microsoft PowerPoint, and Microsoft Outlook. This includes sharing customer, contact, lead, and activity information, inserting Costpoint CRM Opportunity record information or Document record text into PowerPoint presentations, as well as searching the Costpoint CRM Document Info Center for data for your Word documents. In addition, you can automatically generate Costpoint CRM customers, contacts, and activities, and even search the database directly from your desktop.

For more information about the Microsoft Office and Desktop Integration module, see Chapter 7 of this guide.

To set up a default location for MODI e-mail attachments:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM Main Menu. Costpoint CRM displays the General System Settings form.
2. Select the Miscellaneous tab.
3. Enter the default network location In the **Default Attachment Save Location (MODI)** field.

   The Default Attachment Save Location (MODI) option is used for MODI e-mail attachments only. For Costpoint CRM e-mail settings, see "Set Up E-mail Preferences" on page 24 of this guide.

4. Click **Save**.

Enable/Set Up Document Management

The Document Management module allows you to share information by providing a Web-based document collaboration platform for all team members. With Costpoint CRM Document Management, team members can store, share, and collaborate on a set of documents for every contract, employee, customer, or other key Costpoint CRM record.

This tab allows you to enable and set up the Document Management module.

For more information about using Document Management, see the Info Center book in the Costpoint CRM Help system.

To enable and set up Document Management:

1. Click **Configuration**, **General**, **System Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General System Settings form.
2. Select the Document Management tab.
3. Complete the fields on this tab, as described below:

Field	Description
Enable Document Management	Select this option to turn on Document Management functionality in Costpoint CRM. Once enabled, Document Management tabs appear in all Info Centers.

Field	Description
Server	Enter the location on which the Costpoint CRM Document Management server resides.
Admin Port	Enter the port number of the server.
Test Server Connection	Click this button to test the server information input. A message should appear stating that the test was successful. If so, click **OK**. If not, re-enter the **Server** and/or the **Admin Port**.
Available Sites	Select the site of the Costpoint CRM Document Management application from the drop-down list of available sites.
Test Site Connection	Click this button to test the site selected. A message should appear stating that the test was successful. If so, click **OK**. If not, select another site.

4. Click **Save**.

Set Up General Company Settings

Use General Company settings to enter your firm's name and address. The information you enter on this form appears at the top of the Costpoint CRM screens and in the headings of all reports generated. This form also allows you to set up date, time, and number formats.

Costpoint CRM uses the date, time, and number formats that you enter here as system-wide defaults. However, these options can be overwritten on an individual user basis. For more information, see “Set Up User Options” on page 8.

Multicompany

If you are using the Multicompany feature, you need to set up General Company Settings for each company. Note that this form also appears in Configuration, Teams, Codes when you are adding companies to your enterprise.

Set Up Company Name and Address

To set up company name and address, and date formats:

1. Click **Configuration**, **General**, **Company Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General Company Settings form.
2. Select the General tab.
3. Complete the fields on this tab, as described below:

Field	Description
Firm Name	Enter your firm’s name, up to 42 characters. This name appears at the top of the Costpoint CRM screens and in the headings of all reports generated.
Byline	Enter the byline of the firm, up to 42 characters.
Address Line 1-4	Enter address information, up to 42 characters per line.

Field	Description
Country	This field is required and will be used in all reports that do not have a Display Country option to determine whether the country field will be displayed for a particular record. Existing users will have companies set up with no country. For these users, the reports will always display the country on reports. For more information, see the International Address Formats topic in the Costpoint CRM Online Help system.
Default Address Format	Select the Default Address Format for the Address fields within Costpoint CRM. The default is Format 1. If the Country and State/Province fields are blank on a record, then the Default Address Format will be used to determine which address format is used in reports. For more information, see the International Address Formats topic in the Costpoint CRM Online Help system.

4. Click **Save**.

Set Up Company Phone Formats

The Phone Formats feature affects the default settings applied to records created after the feature is enabled, and whether the <None> format is available in the list. See the “Code Tables Set Up Overview” topic in the Costpoint CRM Online Help system for more information.

To set up company phone formats:

1. Click **Configuration**, **General**, **Company Settings** from the Costpoint CRM main menu. Costpoint CRM displays the General Company Settings form.
2. Select the Formatting tab.
3. Complete the fields on this tab, as described below:

Field	Description
Allow No Format	Select this option to allow users to choose <None> as the Country and Description in the Phone Format Selection dialog. Costpoint CRM selects this option by default.

Field	Description
Default Country	Select the default country for the phone format. This drop-down lists all countries that you have set up in the Phone Format code table. Costpoint CRM sets this option to <None> by default. When completing any of the phone fields throughout Costpoint CRM, users may change the value you enter here to another country format.
Default Description	Since there may be more than one format for a country, this field lists all the formats for the country you selected in the Default Country field. Select the desired format. Costpoint CRM sets this option to <None> by default.

4. Click **Save**.

Mobile Application Suite Settings

If your company uses the Costpoint CRM Mobile Application Suite, you see a Mobile tab in the General Company Settings form in Configuration, General, Company Settings. On the Mobile tab, a Costpoint CRM system administrator selects records and fields to download to hand-held devices for each Customer Relationship Management (CRM) application   Customers, Contacts, Opportunities, and Activities:

Note that these are company-wide settings. If users wish, they can download their individual projects in User Options. See “Set Up User Options” on page 7.

See the Costpoint CRM Online Help system or speak with your Deltek representative for complete information about the Costpoint CRM Mobile Application Suite.

To download fields, complete the following steps:

1. From the Costpoint CRM main menu, click **Configuration** » **General** » **Company Settings** to display the General Company Settings form.
2. Select the Mobile tab.
3. From **Application**, select the application (Activities, Contacts, Customers, or Opportunities) for which you want to select fields.
4. In the **Available Fields** list box, click the fields that you want downloaded to the hand-held device, and click the **Add** button to move the items to the **Selected Fields** list box.

   To select multiple adjacent fields in the list, click the first field, and then hold down the SHIFT key while you click the last field that you want to select.To select nonadjacent fields, click the first field, and then hold down the CTRL key while you click other fields that you want to select.
5. Click **Save**.

Set Up User Defined Tabs and Fields

The User Defined Tabs application allows you to customize your Info Center to better suit your company's needs. Using User Defined Tabs, you can add new tabs, fields, and grids; and determine the order of tabs and fields. Before you begin adding new tabs, carefully determine what information you need to gather that is not captured elsewhere in Costpoint CRM. Also consider how you want this information grouped.

Standard vs User Defined Tabs

In Deltek Costpoint CRM, there are two types of tabs — standard and user defined.

- Standard tabs are tabs that come as part of the Costpoint CRM product. In the User Defined Tabs application, you can change the names and order of these tabs, as well as add fields and grids to them.
- User Defined tabs are the tabs that you add to Info Centers using the User Defined Tabs application. You determine the fields and grids you want to display on these tabs. User defined tabs and fields can be used in any situation in which you need to track data that is not a standard part of Costpoint CRM.

For Example

Your company may need to track “change orders” for contracts, as required for state architectural and engineering forms. You could set up a user defined tab containing all the appropriate fields that are needed for the state form, and then place codes on the proposal templates allowing you to move information directly into the proposal forms. Other examples where you might want to create tabs or fields would be for information such as professional affiliations, bonding information, or contract types.

Mapping Fields

The Mapping tab of User Defined Tabs allows you to map user defined fields and grid information between the Opportunity Info Center and the Contract Info Center when you create a contract from an opportunity.

User Defined Tabs Application and the Screen Designer

Once you have added your tabs, fields, and grids, you can use the Screen Designer to easily re-arrange tab elements, resize fields and labels, and determine whether you want certain fields hidden or locked based on Security role. See “Screen Designer” on page 113 for more information.

Working With Tabs

Use the Tab tab in User Defined Tabs to:

- Add user defined tabs.
- Modify the order of both standard and user defined tabs.
- Change the names of both standard and user defined tabs.
- Restore the names of standard tabs, if you changed them.
- Delete user defined tabs (you cannot delete standard tabs).

To add/modify tabs:

1. Click **Configuration**, **General**, **User Defined Tabs** from the Costpoint CRM main menu. Costpoint CRM displays the User Defined Tabs form.
2. In the **Application** field, select the application to which you want to add user defined tabs.
3. Select the Tabs tab. The Tabs grid displays both standard and user defined (custom) tabs for that application.
4. Position the cursor on the line above where you want to insert a tab, and click **Insert**.
5. Complete/modify the fields on this tab, as described below:

Field	Description
Application	Select the application for which you want to create or modify tabs.
Tab Heading	Displays the names of existing standard and user defined tabs for the selected application. Enter a new tab name or change the name of an existing standard or user defined tab. The name you enter will appear on the tab, and will also be used as a reference in other Costpoint CRM program areas. You can modify these names at any time. Note the following when adding/modifying tab names: • Tab names must begin with a letter, not a number. • If data from this user defined tab is to be merged in Custom Proposals, the tab name cannot include the following symbols: !, @, (,), or &.
Tab Type	Displays the tab type, either Standard (shipped with Costpoint CRM) or Custom (user defined).

6. Also use the Tabs tab to:
   - Modify the Order of Tabs. Select the name of the tab and click Move Up and Move Down to arrange the order in which the tabs appear in the application.

- Change the Names of Tabs. You can change the names of both standard and user defined tabs. Simply enter the new name in the Tab Heading field.
- Restore Headings for Standard Tabs. If you changed the headings on a standard tab, you can restore the tab's original headings. Select the tab and click **Restore**.
- Delete Tabs. You can only delete user defined tabs; you cannot delete standard tabs. If a user defined tab has fields or grids assigned to it, you must first re-assign the fields and grids on that tab to another tab or delete them before you can delete the tab. You cannot undo **Delete**. Deleting a tab permanently removes the tab. Select the tab and click **Delete**.

7. Click **Save**.
8. Add fields or grids to the tabs as needed. See the following section for details.

Working With Fields

The Fields tab in User Defined Tabs allows you to:

- Add fields to both standard and user defined tabs.
- Change the names of user defined fields. (To change the names of standard fields, you must use the Screen Designer.)
- Change the order in which the fields appear on the tab.
- Delete user defined fields. (You cannot delete standard fields, but you can “hide” them using the Screen Designer.)

The Fields tab displays only user defined fields; it does not display standard fields that were shipped with Costpoint CRM. Once you add fields, use the Screen Designer (page 113) to easily re-arrange and resize them as needed.

When adding or modifying fields, please note the following:

- The Fields tab allows you to move fields from one tab to another without losing the data in that field. To move a field to another tab, simply select the new tab in the Tab field for that field.
- When you add fields to user defined tabs Costpoint CRM positions the fields in the order in which you designate on the Fields tab, starting in the top left corner of the tab. When you add fields to standard tabs, Costpoint CRM positions them beneath existing fields on the tab, outside of the main tab area. You then use the Screen Designer (page 113) to move the fields to the desired positions.
- If you are adding both fields and grids to a tab, fields are listed first, then grids.

To add/modify fields:

1. Click **Configuration**, **General**, **User Defined Tabs** from the Costpoint CRM main menu. Costpoint CRM displays the User Defined Tabs form.
2. In the **Application** field, select the application to which you want to add fields to tabs.
3. Select the Fields tab.
4. Position the cursor on the line above where you want to insert a field, and click **Insert**.
5. Complete/modify the fields on this tab, as described below:

Field	Description
Application	Select the application for which you want to create/ modify user defined fields on tabs.
Tab	Select the tab to which you want to add a field. Both standard and user defined tabs for the selected application appear in the list.

Field	Description
Label	Labels are parts of the tab that are set apart from other parts of the tab, for example, address fields. They differ from group boxes (which are also used to encompass a group of fields) in that section headings have a colored tab similar to a grid. Group boxes are boxes that encircle a set of fields. A label for the grouped fields displays at the top left portion of the group box. Use the Screen Designer (page 113) to add group boxes.
Label Database Codes	Enter a name for the field, for example, Birthday. If data from this user defined field is to be merged in Custom Proposals, the field label cannot include the following symbols: !, @, (,), or &. If you change the label name, Costpoint CRM displays a message asking you whether you also want the database column name to be changed. If you select Yes, you may have to make changes in your saved searches and custom reports, if you use these.
Data Type	Select the data type for the user defined field. Some of these options are lookup list fields. Lookup lists are fields in which you can search for and select a particular Info Center item, such as a contact or employee. For more information about lookup lists, see the Getting Started book in the Costpoint CRM Help system. Once you select a data type for the field and data is entered into that field, you cannot change the data type, with the exception of three types: Character, Drop Down, and Lookup. These three are compatible types and are interchangeable. If you need to change any other data types, you need to delete that field and add it again. You have the following options: **Lead**. Creates a Lead lookup list field. **Character**. Alphanumeric values

Field	Description
Data Type	**Check Box**. Determines if the field is a Yes/No checkbox. When the field is checked, a value of Y is entered into the database. When the field is unchecked, a value of N is entered into the database. **Customer**. Creates a Customer lookup list field. **Contact**. Creates a Contact lookup list field. **Contract**. Creates a Contract lookup list field. **Currency**. Creates a currency field. **IMPORTANT**: When using Costpoint CRM, there is no indication of which currency code is associated with the field. Therefore, the label for this field should be used to identify the currency code value. **Date**. Determines if the field contains a date value. The field includes a pop-up calendar that can be accessed from the arrow to the right of the field value. **Document**. Creates a Document lookup list field. **Drop Down**. Creates a drop down list field. If you select this option, you create the entries that will appear in the list using the **List of Values** field. **Employee**. Creates an employee lookup list field. When you create an employee data type, Costpoint CRM adds two new fields to the Lookup dialog for that Info Center: one for the employee name and one for the employee number. The employee number search field is compatible with the “is me” operator, so that you can use that operator for user defined employee type fields. For example, if you create a user defined Customer Info Center field called **Special Contact**, Costpoint CRM creates two search fields, **Special Contact** and **Special Contact Number**. The **Special Contact Number** field can be used with the “is me” operator. For more information about the “is me” feature, see the Getting Started book in the Costpoint CRM Help system. **Lookup**. Creates a lookup list field similar to a drop down field, except you select a value from the list using a lookup dialog. If you select this option, you create the entries that will appear in the dialog using the **List of Values** field. **Marketing Campaign**. Creates a Marketing Campaign lookup list field.

Field	Description
Data Type	**Memo**. Creates an RTF (rich text format) field for formatted text. If you select this option, use the **Lines** field to determine the space available in the field for entering text. **Numeric**. Creates a numeric field. If you select this option, you can enter the number of decimals used in the number in the **Decimals** field. **Opportunity**. Creates an Opportunity lookup list field. **Vendor Partner**. Creates a Vendor/Partner lookup list field. **Team**. Creates a Team lookup list field. **URL**. If you select this data type, you can enter and save a Web site address in the field, which you can then click to automatically launch the site in a new browser window.
Width	Determines the number of characters you want to display for the field. Costpoint CRM calculates how wide the field should be on the screen based on the fonts used in Costpoint CRM. Basically, Costpoint CRM multiplies the number in this field by 6 to arrive at the number of pixels in the field. For example, if you enter 20, then the number of pixels for the field would be 120. Remember, you can always adjust the size of the field using the Screen Designer (page 113).
Lines	If you selected Memo in the **Data Type** field, this field allows you to determine the number of lines of allowed text in the **Memo** field. Basically, if you use a size 8 font in this field, then the number you enter here is equal to one line of text.
List of Values	If you selected Drop Down or Lookup in the **Data Type** field, this field allows you to list the entries that will appear in the drop down list. When you click on this field, Costpoint CRM displays a Column Values dialog. Click **Insert** to add new entries; use the **Move Up** and **Move Down** buttons to determine the order of the entries. If you select the **Limit entry to values in list** option, users will only be allowed to select one of these entries. If you do not select this option, users can either select one of these entries or enter other entries not included in the list.

Field	Description
Total	Select this option if you want a total to appear for a list of numbers in reports. This option applies to Numeric and Currency data types only.
Decimals	If you selected Numeric in the **Data Type** field, this field allows you to determine the number of decimal points in the number. For currency, this defaults to your currency format (2 for US)
Min. Value	If you selected Numeric or Currency in the **Data Type** field, this field allows you to determine the minimum number that the user can enter in the field. If you leave this field blank, no minimum value is set. In other words, you can enter a negative number. To allow a minimum of any non-negative number, enter 0.
Max. Value	If you selected Numeric or Currency in the **Data Type** field, this field allows you to determine the maximum number that the user can enter in the field. If you leave this field blank, no maximum value is set.
Required	Select this option if the field is required for all users. In other words, Costpoint CRM will not save the record if no data is entered in this field.
Reqd. Level	This option is only applicable to the Contract Info Center and is only available if the field is Required. You have the following options: • **All Levels**. Select this option if you want the field required at all levels (for example, contract, phase, task). • **Contract**. Select this option if you want the field to be required at the top level only and not at lower levels (contract only). • **Lowest**. Select this option if you want the field to be required at the lowest level (the charging level) of any given node of a particular contract. For example, when a new phase is created for a contract, the field will be required even if the contract has other phases that have tasks. If a specific phase already has a task, the field will not be required at the phase level.

Field	Description
Default Value	Enter the default value for the field. This field is only available if the following data types are selected: Character, Check Box, Currency, Date, Drop Down, Lookup, Numeric, and URL. • **Checkbox** Data Types. These data types have a default value of N by default. You can change the default value to Y, but you cannot leave it blank. • **Date** Data Types. You can either type in the words **Current Date** or enter a date. If you enter **Current Date**, new records will always default to the current date. You can also select a date from the calendar icon in this field. • **Lookup**, **Drop Down** Data Types. If the data type is either Lookup or Drop Down, the **Default Value** field will contain a Lookup icon. • **Currency**, **Numeric** Data Types. Enter any valid numbers. • **Character**, **URL** Data Types. Enter any alphanumeric characters.

6. Click **Save**.

To delete fields:

1. Click **Configuration**, **General**, **User Defined Tabs** from the Costpoint CRM main menu. Costpoint CRM displays the User Defined Tabs form.
2. In the **Application** field, select the application for which you want to delete the field.
3. Select the Fields tab.
4. Select the field you want to delete.
5. Click **Delete**.
6. Click **Save**.

You cannot undo Delete. Deleting a field permanently removes the field and any values that have been entered into the field for all records in the database. You can only delete user defined fields. You cannot delete standard fields.

Working With Grids

Use the Grids tab in User Defined Tabs to:

- Add grids to both standard and user defined tabs.

- Add columns to user defined grids.
- Determine the order in which grids appear on a tab.
- Determine the order in which columns appear in a user defined grid.
- Delete user defined grids (You cannot delete standard grids, but you can "hide" them using the Screen Designer.)

When you add grids to user defined tabs, Costpoint CRM positions the grids in the order in which you designate on the Grids tab, starting in the top left corner of the tab. If you are adding both fields and grids to a user defined tab, fields are listed first, then grids. When you add grids to standard tabs, Costpoint CRM positions them beneath existing grids/fields on the tab, outside of the main tab area.

Once you add grids, you can then use the Screen Designer to easily move the grids to the desired positions. See "Screen Designer" on page 113.

To add/modify grids:

1. Click **Configuration**, **General**, **User Defined Tabs** from the Costpoint CRM main menu. Costpoint CRM displays the User Defined Tabs form.
2. In the **Application** field, select the application to which you want to add grids to tabs.
3. Select the Grids tab.
4. Complete/modify the fields on this tab, as described below:

Field	Description
Application	Select the application for which you want to create or modify tabs.
Grids Grid	
Tab	Select the tab for which you want to add a grid.
Caption	Enter a name for the grid. Note that if you change the Caption name, Costpoint CRM displays a message asking you whether you also want the database table name to be changed. If you select Yes, you may have to make changes in your saved searches and custom reports, if you use these.
Rows	Enter the number of grid rows in which users are allowed to enter data.
Columns Grid	
Heading	Enter the column headings. Note that if you change the column name, Costpoint CRM displays a message asking you whether you also want the database column name to be changed. If you select Yes, you may have to make changes in your saved searches and custom reports, if you use these.

Field	Description
Data Type	Select the data type for the user defined field. Some of these options are lookup list fields. Lookup lists are fields in which you can search for and select a particular Info Center item, such as a contact or employee. For more information about lookup lists, see the Getting Started book in the Costpoint CRM Help system. Once you select a data type for the field and data is entered into that field, you cannot change the data type, with the exception of three types: Character, Drop Down, and Lookup. These three are compatible types and are interchangeable. If you need to change any other data types, you need to delete that field and add it again. You have the following options: **Lead**. Creates a Lead lookup list field. **Character**. Alphanumeric values. **Check Box**. Determines if the field is a Yes/No checkbox. When the field is checked, a value of Y is entered into the database. When the field is unchecked, a value of N is entered into the database.

Field	Description
Data Type	**Customer**. Creates a Customer lookup list field. **Contact**. Creates a Contact lookup list field. **Contract**. Creates a Contract lookup list field. **Currency**. Creates a currency field. **IMPORTANT**: When using Costpoint CRM, there is no indication of which currency code is associated with the field. Therefore, the label for this field should be used to identify the currency code value. **Date**. Determines if the field contains a date value. The field includes a pop-up calendar that can be accessed from the arrow to the right of the field value. **Document**. Creates a Document lookup list field. **Drop Down**. Creates a drop down list field. If you select this option, you create the entries that will appear in the list using the **List of Values** field. **Employee**. Creates an employee lookup list field. When you create an employee data type, Costpoint CRM adds two new fields to the Lookup dialog for that Info Center: one for the employee name and one for the employee number. The employee number search field is compatible with the “is me” operator, so that you can use that operator for user defined employee type fields. For example, if you create a user defined Customer Info Center field called **Special Contact**, Costpoint CRM creates two search fields, **Special Contact** and **Special Contact Number**. The **Special Contact Number** field can be used with the “is me” operator. For more information about the “is me” feature, see the Getting Started book in the Costpoint CRM Help system. **Lookup**. Creates a lookup list field similar to a drop down field, except you select a value from the list using a lookup dialog. If you select this option, you create the entries that will appear in the dialog using the **List of Values** field. **Marketing Campaign**. Creates a Marketing Campaign lookup list field. **Memo**. Creates an RTF (rich text format) field for formatted text. If you select this option, use the **Lines** field to determine the space available in the field for entering text.

Field	Description
Data Type	**Numeric**. Creates a numeric field. If you select this option, you can enter the number of decimals used in the number in the **Decimals** field. **Opportunity**. Creates an Opportunity lookup list field. **Vendor/Partner**. Creates a Vendor/Partner lookup list field. **Team**. Creates a Team lookup list field. **URL**. If you select this data type, you can enter and save a Web site address in the field, which you can then click to automatically launch the site in a new browser window.
Width	Determines the number of characters you want to display for the column. Costpoint CRM calculates how wide the column should be on the screen based on the fonts used in Costpoint CRM. Basically, Costpoint CRM multiplies the number in this field by 6 to arrive at the number of pixels in the field. For example, if you enter 20, then the number of pixels for the column would be 120. Remember, you can always adjust the size of the column using the Screen Designer.
Sorted	Determines whether the rows will be sorted by the column in question when first retrieved. Sorted may only be selected for one column in each grid.
List of Value	If you selected Drop Down or Lookup in the **Data Type** field, this field allows you to list the entries that will appear in the drop down list. When you click on this field, Costpoint CRM displays a Column Values dialog. Click **Insert** to add new entries; use the **Move Up** and **Move Down** buttons to determine the order of the entries. If you select the **Limit entry to values in list** option, users will only be allowed to select one of these entries. If you do not select this option, users can either select one of these entries or enter other entries not included in the list.
Total	Select this option if you want a column total to appear at the bottom of the grid. This total field also appears for a list of numbers in reports. This option applies to Numeric and Currency data types only.

Field	Description
Decimals	If you selected Numeric in the **Data Type** field, this field allows you to determine the number of decimal points in the number. For currency, this defaults to your currency format (2 for US)
Min. Value	If you selected Numeric or Currency in the **Data Type** field, this field allows you to determine the minimum number that the user can enter in the field. If you leave this field blank, no minimum value is set. In other words, you can enter a negative number. To allow a minimum of any non-negative number, enter 0.
Max. Value	If you selected Numeric or Currency in the **Data Type** field, this field allows you to determine the maximum number that the user can enter in the field. If you leave this field blank, no maximum value is set.
Required	Select this option if the field is required for all users. In other words, Costpoint CRM will not save the record if no data is entered in this field.
Reqd Level	This option is only applicable to the Contract Info Center and is only available if the field is Required. You have the following options: • **All Levels**. Select this option if you want the field required at all levels (for example, contract, phase, task). • **Contract**. Select this option if you want the field to be required at the top level only and not at lower levels (contract only). • **Lowest**. Select this option if you want the field to be required at the lowest level (the charging level) of any given node of a particular contract. For example, when a new phase is created for a contract, the field will be required even if the contract has other phases that have tasks. If a specific phase already has a task, the field will not be required at the phase level.

Field	Description
Default Value	Enter the default value for the field. This field is only available if the following data types are selected: Character, Check Box, Currency, Date, Drop Down, Lookup, Numeric, and URL. • **Checkbox** Data Type. These data types have a default value of N by default. You can change the default value to Y, but you cannot leave it blank. • **Date** Data Type. You can either type in the words Current Date or enter a date. If you enter Current Date, new records will always default to the current date. You can also select a date from the calendar icon in this field. • **Lookup**, **Drop Down** Data Types. If the data type is either Lookup or Drop Down, the **Default Value** field will contain a Lookup icon. • **Currency**, **Numeric** Data Types. Enter any valid numbers. • **Character**, **URL** Data Types. Enter any alphanumeric characters.

5. Also use this Grids tab to:
   - **Modify the order in which grids appear in the application**. Select the name of the grid in the Grids grid and click **Move Up** and **Move Down** to arrange the order in which the grids appear in the tab.
   - **Modify the order in which columns appear in the grid**. Select the name of the column heading in the Columns grid and click **Move Up** and **Move Down** to arrange the order in which the columns appear in the grid. Note that users can change this order individually.
6. Click **Save**.

To delete grids:

1. **Click Configuration**, **General**, **User Defined Tabs** from the Costpoint CRM main menu. Costpoint CRM displays the User Defined Tabs form.
2. In the **Application** field, select the application for which you want to delete a grid.
3. To delete the entire grid, select the grid in the Grids grid, and click **Delete**.
4. To delete a column in the grid, select the column in the Columns grid, and click **Delete**.
5. Click **Save**.

> You cannot undo Delete. Deleting a grid permanently removes the grid, all of the fields associated with the grid, and any values that have been entered into the grids for all records in the database. You can only delete user defined grids. You cannot delete standard grids.

Mapping Fields

The Mappings tab allows you to map user defined fields and grid information between the Opportunity Info Center and the Contract Info Center so that these fields are automatically populated when you create a contract from an opportunity.

For example, if you created a user defined field called Construction Contact in both the Contract Info Center and the Opportunity Info Center, you could map these two fields. Then, every time you create a contract from an opportunity, the information in the Opportunity Construction Contact field is automatically entered in the Contract Construction Contact field.

After the action is taken (that is, create contract from opportunity), the mapped fields become independent. In other words, if you later change the field information in the Opportunity Info Center, it will not be changed in the Contract Info Center.

Note the following when mapping fields and grids:

- You can only map fields to fields and grids to grids. Costpoint CRM will not allow you to select a grid when mapping to a field and vice versa.
- Mapped fields and grids do not have to have the same label. Although, since the most common use of this feature is to ensure that values are carried over from the Opportunity Info Center to the Contract Info Center when creating a new contract, it is advisable to create user defined fields with similar, if not identical names, wherever they are needed in the Opportunity and Contract Info Centers.
- Once mapped on this tab, it is possible to change the labels of these fields or grids using the Screen Designer. The mappings remain associated with the original labels of the fields, but display in the Info Centers with the new label.

  If, however, you change the label of the field or grid using User Defined Tabs application, Costpoint CRM displays a message asking you if you want to change the underlying original labels. If you select Yes, Costpoint CRM changes the underlying label and you will need to remap the field or grid. If you select No, Costpoint CRM does not change the underlying label and you do not have to remap the field or grid.
- Fields that do not have a compatible data type should not be mapped. You should not, for example, map a field with a data type of date to a field with a data type of numeric.

To map fields:

1. Click **Configuration**, **General**, **User Defined Tabs** from the Costpoint CRM main menu. Costpoint CRM displays the User Defined Tabs form.
2. Select the Mappings tab.

   Note that since you map between specific Info Centers, the **Application** field does not apply to this tab.
3. Click **Insert**. Costpoint CRM inserts a new row. Each row represents a mapping of either fields or grids between the Opportunity Info Center and the Contract Info Center.

4. Complete/modify the fields on this tab, as described below:

Field	Description
Opportunity Grid	This field displays a <Field> entry and all user defined grids for all Opportunity Info Center tabs. If you want to map an Opportunity Info Center field, select <Field>. Then select the specific field in the **Opportunity Column** field. If you want to map an Opportunity Info Center grid column heading, select the name of the grid. Then select the column heading in the **Opportunity Column** field. If you want to map all column headings in that grid, you need to create an entry for each one. You cannot map an entire grid to an entire grid in one entry (row).
Opportunity Column	If you selected <Field> in the **Opportunity Grid** field, this column displays all of the user defined fields on all tabs of Opportunity Info Center. Select the field you want to map. If you selected a grid in the Opportunity Grid column, this field displays all of the column headings for that grid. Select the column heading you want to map.
Contract Grid	This field displays a <Field> entry and all user defined grids for all Contract Info Center tabs. If you want to map a Contract Info Center field, select <Field>. Then select the specific field in the **Contract Column** field. If you want to map a Contract Info Center grid column heading, select the name of the grid. Then select the column heading in the **Contract Column** field. If you want to map all column headings in that grid, you need to create an entry for each one. You cannot map an entire grid to an entire grid in one entry (row).
Contract Column	If you selected <Field> in the **Contract Grid** field, this column displays all of the user defined fields on all tabs of Contract Info Center. Select the field you want to map. If you selected a grid in the Contract Grid column, this field displays all of the column headings for that grid. Select the column heading you want to map.

5. Click **Save**.

Set Up Code Tables

Costpoint CRM incorporates drop-down lists called Code Tables to streamline your Info Center entries. Code tables allow you to set up standard values for many of Costpoint CRM's Info Center fields. The values can be used to save time during routine entry or to enforce uniformity in Costpoint CRM's data fields.

You can add an unlimited number of entries to any code table. You can add, edit, and delete Code Table entries at any time.

Standards for each of the code tables should be set, and then the tables should be populated prior to entering data in the Info Centers. For example, if you decide your educational degrees will use the format B.A., M.A., and so on (as opposed to BA or Bachelor of Arts), populate the Degree code tables with all possible degrees in the appropriate format.

The Customer Role, Contact Role, and Employee Role code tables have pre-populated or system entries and their entries cannot be deleted. These system codes provide automatic data entry on the Customers/Contacts tab of Contract Info Center, for example.

Types of Codes

There are three types of code tables in Costpoint CRM.

- One type of code table will dynamically update all existing records that are associated with that respective code to reflect the new description.
- The second type of code table is a table with a list of only Descriptions such as Customer Relationship, Employee Title, and Suffix Tables. If a code is changed, only the value for future lookups will be affected. No changes will be made to existing records.
- The third type of code table allows you to de-select the Active checkbox so that the code will not be a choice for future selections. Existing records in your database associated with a code that is not Active will remain unchanged. New records will not be able to be associated with this code, since it is not Active. This preserves older records’ characteristics that you do not want to use in new records.

Code Table Descriptions

See the Costpoint CRM Help system for a complete list of code tables. The list includes a brief explanation of the code table, a list of possible values for the code table, and a list of fields/forms from which you can access the code table values.

Set Up Code Tables

To insert a new blank row, position the cursor on the row above where you want to insert the row, and click Insert.

To set up Code Tables:

1. Click **Configuration**, **General**, **Code Tables** from the Costpoint CRM main menu. Costpoint CRM displays the Code Table Maintenance form.
2. Click on the name of the code table description that you want to edit. Costpoint CRM displays the list for that code table.
3. Enter new codes, as needed.
4. Click **Save**.

Delete Code Tables

Use this procedure to delete entries, noting the following:

- When you attempt to delete codes that have already been used, Costpoint CRM displays a warning to indicate that the codes will be blanked out everywhere they have been used.
- In some cases, deleting codes can also result in deletion of records. (Costpoint CRM displays a warning.)
- You cannot delete codes in a code table that is prefixed by **sys**. (Costpoint CRM displays a warning.) Certain codes, such as sysOwner have to be kept in the database. (You can, however, change the description of codes beginning with **sys**.) If codes have been added that are prefixed with **sys** and they need to be deleted, contact Costpoint CRM Support.

To delete code tables:

1. Click **Configuration**, **General**, **Code Tables** from the Costpoint CRM main menu. Costpoint CRM displays the Code Table Maintenance form.
2. Click on the desired description. Costpoint CRM displays the list for that code table.
3. Select the code you want to delete,
4. Click **Delete**. Costpoint CRM displays a warning message indicating the consequences of the deletion.
5. Click **Save**.

Create Merge Templates

Merge templates apply to both Proposals and Info Centers.

Costpoint CRM gives you the option to use customized merge templates that integrate your proposals text into any format desired. After adding templates to the database, you can assign specific templates to each role, so users only have access to the templates they need to use.

If users do not have direct access to upload new merge templates, the system administrator uploads custom merge templates to the database in **Configuration**, **General**, **Merge Templates**.

To set up Merge Templates for users in your firm, you must complete the following steps.

1. Download the Costpoint CRMWordMacro.
2. Create Merge Templates.
3. Establish security access rights to templates.

This section also provides directions for deleting and exporting templates.

Download the CostpointCRMWordMacro

This macro only runs on versions of Microsoft Word 2000 or higher.

To create merge templates you need access to the list of supported merge codes. The macro Costpoint CRMWordMacro.dot contains read access to the merge codes, along with formatting options for the merge codes. When installed in Microsoft Word, this macro creates a toolbar, which also contains the Graphics-Expand-Macro to extract linked-graphics into your merged documents.

To download the macro:

1. Click **Utilities**, **Download Merge Macro** from the Costpoint CRM main menu. Costpoint CRM displays the Download Merge Macro form.
2. Click **CostpointCRMWordMacro.dot**.
3. Save the file to your Microsoft Word Startup folder.

   When the CostpointCRMWordMacro.dot template is stored in your Startup folder, Costpoint CRM automatically loads it each time you start Word, appearing in the list of available toolbars.

   From this toolbar, you can:

   - Access the Costpoint CRM Info Center merge codes.
   - Expand the graphics that have been reference during the merge. The graphics place without frames, so that the placeholders can be positioned within tables.

- Expand graphics within frames.

If the Costpoint CRM macro and/or tool bar is not appearing in Microsoft Word, do the following:

- In Word, select **View**, **Toolbars**, and verify that Costpoint CRM Toolbar is selected.
- In Word, select **Tools**, **Templates and Add-Ins**, and verify that CostpointCRMWordMacro.dot appears in the **Document template** field.

Create Custom Merge Templates

Use the Configuration, General, Merge Templates feature to select the appropriate Costpoint CRM Info Center, and then add, update, delete, or export merge templates within the Costpoint CRM database. The templates will be linked to the selected Info Center.

To add a new template to Costpoint CRM:

1. Click **Configuration**, **General**, **Merge Templates** from the Costpoint CRM main menu. Costpoint CRM displays the Merge Templates form.
2. Select the Info Center area where you want the template to reside.
3. Click **Add**. Costpoint CRM displays the Add Merge Template form.
4. Complete the fields on this form, as described below:

Field	Description
Info Center Area	Select the Info Center area where the merge template will reside.
Description	Enter a description for the new merge template.
Merge Template	Enter the path name for the merge template file. Or, click **Browse** to browse for and select the merge template file.

5. Click **OK**.

Establish Access Rights to Templates

After adding templates to the database, you need to assign specific templates to each role, so users only have access to the templates they need in the Proposals and Info Center applications. See the Security section “Merge Templates Function” on page 187 for more information.

Delete Custom Templates

Use the Delete Template option to delete a template from the Costpoint CRM database. After a template is deleted from the database, it is no longer accessible on the Merge Templates tab of Role Security. Make sure you no longer need the template before deleting it from the Costpoint CRM database.

You cannot delete system default or sample templates.

To delete a template from Costpoint CRM:

1. Click **Configuration**, **General**, **Merge Templates** from the Costpoint CRM main menu. Costpoint CRM displays the Merge Templates form.
2. Select the Info Center area where the template resides.
3. Select the template you want to delete.
4. Click **Delete**. The template is deleted from the Costpoint CRM database.

Export Templates

The Export Template option enables you to export a template file and save it locally.

To export a Costpoint CRM template file:

1. Click **Configuration**, **General**, **Merge Templates** from the Costpoint CRM main menu. Costpoint CRM displays the Merge Templates form.
2. Select the Info Center area where the template resides.
3. Select the template you want to export.
4. Click **Export**. Costpoint CRM displays the Export dialog.
5. Select the directory where you want to save the template.
6. Click **OK**. The template downloads to the chosen directory, and is saved with the appropriate file extension.

Using Workflows

Workflows allow you to set up alerts to let your staff know when specific events occur within your Info Center records. Workflows automate the notification process each time a specific event takes place; thereby leading to timelier, more collaborative, and more accurate completion of tasks. An “event” occurs any time a user adds, deletes, or modifies an Info Center record, or a portion of a record.

Once an event takes place, Costpoint CRM performs an action based on the conditions you set, such as sending an e-mail alert, changing the value of a data column, creating an activity, or invoking a Web service.

Both the event and the action can have multiple conditions, or they can have zero conditions (except for the Validate Error and Validate Warning actions, which must have at least one condition). If the conditions of the event are not met, none of the actions for the event will take place. If the conditions of the event are met, Costpoint CRM evaluates the conditions of each action to determine whether or not that action should take place.

Multiple events and actions can be created for a single workflow. For example, you can create a workflow that states, when a new employee is added (event), send an e-mail to the employee’s Technical Director (action), and set up a lunch meeting with the employee’s team members (action).

You can create workflows for both standard and user defined fields and grids.

Types of Workflows

There are two types of workflows:

- User initiated workflows are triggered by a specific user action. Actions include adding, changing, or deleting a record or a portion of a record.
- Scheduled workflows are database queries that run at regular intervals via the process server, and are triggered when user-defined conditions are met.

Workflows and Info Centers

Workflows use the tables in your Info Center records to create actions. For example:

- Contract / Customer Association (PRCustomerAssoc)
- Employee Resume (EMResume)
- Marketing Leads (MktCampaignLeads)

When you create a workflow, you determine whether you want it to apply to the entire Info Center record, or to only a part of the record. For example, you may want to create a workflow alert that is generated when a contract record is deleted, or when a customer association is added to a Contract Info Center record.

Workflow Example

Your firm wants to establish a workflow for the conversion of pending opportunities to awarded contracts. You can establish a workflow that will run every time an opportunity changes from Pending to Awarded status.

When the change to the opportunity status occurs, other actions can be automatically triggered, such as updating the **Close Date** field to today's date, distributing an e-mail to key personnel that includes details of the award, and creating an activity linked to the opportunity.

Additional Workflow Examples

- Send an e-mail to the manager of a contract when the status of an opportunity for that contract is changed to Inactive.
- Enter the current date in the **Termination Date** field of the employee record when an employee's status changes to Terminated.
- Send a dashboard alert to Technical Directors when their employees' team affiliations change.
- Change the status of a contract's phases and tasks to Dormant when the contract's status is changed to Dormant, .
- Notify an administrator when the city and state for an address is changed, but the zip code value is not.

Accessing the Workflow Application

To access Workflows, click **Configuration**, **Workflow** from the Costpoint CRM main menu. Costpoint CRM displays the Workflow form.

Because new workflow types will be added over time, and additional information provided, please see the Costpoint CRM Help system for the most up-to-date explanations and instructions for using the Workflow feature.

The Invoke Custom Methods and Invoke Web Service actions require knowledge about Web servers and/or the development of a Microsoft .NET assembly. If you do not have development experience, please contact Deltek's Custom Development Group for assistance, which is provided on a time and materials basis.

Create Contract Templates

Contract templates are used to create new contract records using pre-defined field values and a standard work breakdown structure (WBS). After your firm decides how you want to structure your contracts, contract templates are an efficient way to ensure that contracts created by users at your firm conform to this structure. Templates provide a baseline for new contracts, which you can then modify to meet the needs of individual contracts.

Create New Contract Templates

To create contract templates from scratch:

1. Click **Configuration**, **General**, **Contract Templates** from the Costpoint CRM main menu. Costpoint CRM displays the Contracts form.
2. Perform one of the following:
    - To create a new template from scratch, click **New**, **New Contract Template**.
    - To create a template that is similar to an existing template, open the existing template and click **New**, **Copy Current Contract Template**. You can then edit the copied template to create a new contract template.
    - To create a template that is similar to an existing contract record or another contract template (not currently open), click **New**, **Create Contract Template from...** You can then edit the copied contract or template to create a new contract template.
3. Complete/modify the fields on the tabs. The tabs and fields are the same as the tabs and fields in the Contract Info Center. See the Contract Info Center book in the Costpoint CRM Help system for field descriptions.
4. If this contract template has phases, click **New**, **New Phase** or **New**, **Create Phase from...**, and proceed in the same manner as you did for contracts.
5. If this phase has tasks, click **New**, **New Task** or **New**, **Create Task from...**, and proceed in the same manner as you did for contracts.
6. Click **Save**.

Modify Contract Templates

To modify contract templates:

1. Click **Configuration**, **General**, **Contract Templates** from the Costpoint CRM main menu. Costpoint CRM displays the Contracts form.
2. In the **Find** field, click  to search for and select the contract template(s) that you want to modify.

3. Complete/modify the fields on the tabs. The tabs and fields are the same as the tabs and fields in the Contract Info Center. See the Contract Info Center book in the Costpoint CRM Help system for field descriptions.
4. If this contract template has phases, open the phase you want to modify and proceed in the same manner as you did for contracts.
5. If this phase has tasks, open the task you want to modify and proceed in the same manner as you did for contracts.
6. Click **Save**.

Delete Contract Templates

To delete contract templates:

1. Click **Configuration**, **General**, **Contract Templates** from the Costpoint CRM main menu. Costpoint CRM displays the Contracts form.
2. In the **Find** field, click  to search for and select the contract template(s) that you want to delete.
3. Click **Delete Record**. Costpoint CRM displays a message asking you to confirm the deletion.
4. Click **Yes**.

Create Contract Defaults

The Contract Defaults application allows you to create default values for contracts that automatically appear in fields when you create a new contract record, thereby making it quicker to create contracts with values that you use on a regular basis.

For example, if all your contracts are Federal Contracts, you could select this option in Contract Defaults. Then when you create a new contract, this selection would automatically appear for the contract. Contract Defaults only apply to the first WBS level of your contract records.

Only those tabs that would be logically used for defaults appear in Contract Defaults: General, Dates & Costs, and Location. For the same reason, certain standard fields and user-defined fields do not appear on these tabs.

Contract Defaults and New Contracts

You can override contract defaults at any time.

When you create a new contract in the Contract Info Center, Costpoint CRM applies contract defaults in the following ways:

- If you create a contract using the **New**, **New Contract** option from the Contract Info Center toolbar, Costpoint CRM applies all the contract defaults to the contract.
- If you create a contract from an opportunity, certain values (such as contract type) are determined by values in the opportunity record; for fields not pulled from the opportunity record, contract defaults are used.
- If you create a contract by copying an existing one, Costpoint CRM uses the field information of the existing contract; it does not use contract defaults.
- If you create a contract using Contract Templates, Costpoint CRM uses the field information of the template; it does not use contract defaults.

Contract Defaults and New Contract Templates

Contract default values are also used when you create new contract templates. Costpoint CRM applies default values to new contract templates in the same way that it applies default values to new contract records.

To create contract defaults:

1. Click **Configuration**, **General**, **Contract Defaults** from the Costpoint CRM main menu. Costpoint CRM displays the Contracts Default form.
2. Enter contract defaults in the available tabs and fields. For information on field definitions, see the Contract Info Center topics in the Costpoint CRM Help system.
3. Click **Save**.

Set Up Currency

Currency Configuration allows you to maintain data for the currency that your firm uses, including code, description, symbol, and units.

To configure currencies:

1. Click **Configuration**, **General**, **Currency** from the Costpoint CRM main menu. Costpoint CRM displays the Currency Configuration form.
2. Complete the fields on this form, as described below:

Field	Description
Decimal Places	Enter the decimal places for the currency. For example, if you are using dollars, enter 2; if you are using yen, enter 0.
Symbol	Select the symbol for the currency.
Major Unit Label Plural	Enter the major unit label plural for the currency, such as Dollars.
Major Unit Label Singular	Enter the major unit label singular for the currency, such as Dollar.
Minor Unit Label Plural	Enter the minor unit label plural for the currency, such as Cents.
Minor Unit Label Singular	Enter the minor unit label singular for the currency, such as Cent.

3. Click **Save**.

Create Custom Report Options

Costpoint CRM reporting options determine which information is displayed in the current report, how the data is formatted, and the sequence in which the data appears. You can select options for each standard Costpoint CRM report from the Options dialog, available from the Reporting application. Each report has options specific to that report.

Add Options to Custom Reports

You must create a custom report before adding options from the Custom Report Options form. See the “Costpoint CRM Custom Reports” topic in the Reporting section of the Online Help system for more information on creating custom reports.

To add options to a custom report:

1. Click **Configuration**, **General**, **Custom Report Options** from the Costpoint CRM main menu. Costpoint CRM displays the Report Custom Options form.
2. Select the custom report for which you want to create an options page from the Report Name field. See the Costpoint CRM Help system for more information.
3. Click **Insert** to add an option to the Options grid.
4. Complete the fields on this form, as described below:

Field	Description
Report Name	Select the custom report for which you want to create custom options.
Option Label	Enter a name for the field, for example, Birthday.
Parameter Name	Enter a parameter that you will use to reference the field in a custom report. Acceptable characters include all alphanumerics and the underscore (_) symbol.
Data Type	Select the data type for the custom field. Some of these options are lookup list fields. Lookup lists are fields in which you can search for and select a particular contact, employee, contract, and so on. For more information about lookup lists, refer to the Lookup Lists Overview in the Costpoint CRM Help system. You have the following options: **Character**. Alphanumeric values, up to 70 characters. **Check Box**. Determines if the field is a Yes/No checkbox field. When the field is checked, a value of Y is entered into the database. When the field is unchecked, a value of N is entered into the database.

Field	Description
Data Type	**Customer**. Creates a Customer lookup list field. **Contact**. Creates a Contact lookup list field. **Contract**. Creates a Contract lookup list field. **Date**. Determines if the field contains a date value. The field includes a popup calendar that can be accessed from the arrow to the right of the field value. **Document**. Creates a document lookup list field. **Employee**. Creates an Employee lookup list field. **Lookup**. Alphanumeric values, up to 20 characters. The field includes a drop-down list and lookup table of values that can be modified by double clicking on the lookup field. **Memo**. Creates an RTF (rich text format) field with unlimited formatted text. **Numeric**. Creates a numeric field. **Opportunity**. Creates an Opportunity lookup list field. **Search**. This data type functions exactly the same as the Lookup data type, except a Costpoint CRM search field (with a search icon to open a search dialog) is used instead of a drop-down list. With these types of fields, the records in the user defined lookup list are NOT retrieved until the user opens the dialog and clicks **Search**. In addition, since it is a dialog search, you have the added ability of being able to use Quick Find to key in the first few characters of the value if you know part of the value. If your company has a large database, you may want to use this data type instead of Lookup, since using Lookup may cause performance problems. **Vendor/Partner**. Creates a Vendor/Partner lookup list field. **URL**. If you select this data type, you can enter and save a Web site address in the field, which you can then click to automatically launch the site in a new browser window

Field	Description
Default Value	Enter the default value for the field. This field is available with the standard data types String, Numeric, Date, Search, Lookup, and Checkbox. • **Checkbox Data Types**. These data types have a default value of N, meaning not selected. Change this option to Y for the default value to be selected. • **Date Data Types**. Either type the text Current Date or enter any date in m/d/yy format. If you enter Current Date, new records will always default to the current date. You can also select a date using the Calendar icon in this field. • **Lookup or Search Data Types**. If the data type is either Lookup or Search, the **Default Value** field will contain a Lookup icon.
Display Width	Determines the number of characters you want to display for the field. Costpoint CRM calculates how wide the field should be on the screen based on the fonts used in Costpoint CRM.
Memo Height	If you select Memo in the **Data Type** field, this field allows you to determine the number of lines you want to appear for the memo. For example, if you enter 5, Costpoint CRM calculates the proper height of the memo field to accommodate five lines of text.
Limit to List	This option applies only to options with a Data Type of Lookup. If you select this option, users will only be allowed to select one of these pre-defined values. If you do not select this option, users can either select one of the pre-defined values or enter other values not included in the list.
Total	Select this option if you want a column total to appear at the bottom of the grid. This option applies to Numeric Data Types only.
Currency	If you selected Numeric in the **Data Type** field, this field allows you to use your currency format.
Decimals	If you selected Numeric in the **Data Type** field, this field allows you to determine the number of decimal points in the number. For currency, this defaults to your currency format (2 for U.S.)
Minimum Value	If you selected Numeric in the **Data Type** field, this field allows you to determine the minimum number that the user can enter in the field.

Field	Description
Maximum Value	If you selected Numeric in the **Data Type** field, this field allows you to determine the maximum number that the user can enter in the field.
Required for CRM	Select this option if the field is required for CRM. In other words, Costpoint CRM will not save the record if this field is not filled in.

5. Repeat steps 3 and 4 for each option you want to add.

   Options will appear on the Custom Options tab of the Costpoint CRM report Options dialog, when a user opens the Options dialog for the report from the Reporting application. All options appear in the order in which they appear in the Options grid. You can change the position and order, as desired.

6. To change the position and order, click **Reorder**. Costpoint CRM displays the Reorder Report Custom Options dialog. Options that appear in the Fields - Left Column will appear on the left side of the Custom Options tab, and options that appear in the Fields - Right Column grids will appear on the right side of the tab. Select an option and click the **Up** and **Down** buttons to reorder the options vertically. Select an option and click the **Left** or **Right** buttons to move the option to the left or right side of the tab. Click **OK** to save your changes and return to the Custom Report Options form.

7. Click **Save**.

Specify Values for a Custom Lookup Option

For all custom options you add to the Options grid with a Data Type of Lookup, you must specify possible values from which users can make a selection.

To specify values for a Lookup type option:

1. Click **Configuration**, **General**, **Custom Report Options** from the Costpoint CRM main menu.
2. From the **Report Name** field, select the custom report whose Lookup option values you want to specify.
3. Click **Lookup Lists** on the Custom Report Options toolbar. All options from the Options grid for the selected report with a data type of Lookup appear in the Column area.
4. Select the option for which you want to specify values from the Column area.
5. Click **Insert** on the Options grid.
6. In the **Value** field, enter the name of a value you want to make available.
7. To move a value up or down in the list of selections, select the value and click **Up** or **Down** on the Options grid.
8. Click **Save**.

Customize Lookup and Report Labels

The Lookup and Report Labels feature allows you to create custom labels for lookups and reports, including the following:

- **Lookup Search Types Labels**. These labels consist of all the search types that appear in drop-down menus for standard and advanced view lookups.
- **Generic Lookup Search Type Labels**. These labels are commonly used for standard labels, such as Code, Description, Name, and so on (especially for advanced sublist search labels.)
- **Report Column Labels**. You can change the default report column headings and alternate headings. Report column labels only apply to column selection reports.

  Note that report columns can also be changed within the individual report settings. For more information, see the “Report Descriptions Overview” topic in the Costpoint CRM Help system and select the report to which you want to make changes.
- **Report Group Labels**. You can change labels for items that can be grouped on reports.

  Note that report group labels can also be changed within the individual report settings. For more information, see the “Report Descriptions Overview” topic in the Costpoint CRM Help system and select the report to which you want to make changes.

Changing Labels Across Multiple Types

Because all labels are available in a single grid, you can easily change multiple labels across multiple lookup/report types. This grid can also be filtered by different label types, (such as specific report, specific lookup). If you change a label and that label exists for other types, Costpoint CRM displays a message asking you if you want to change all labels that match the label you changed.

Create Custom Lookup and Report Labels

To create custom lookup and report labels:

1. Click **Configuration**, **General**, **Lookup/Report Labels** from the Costpoint CRM main menu. Costpoint CRM displays the Lookup/Report Labels form.

2. Complete the fields on this form, as described below:

   If you modify a default label, and that label appears on other lookups or reports, Costpoint CRM displays a message asking if you want to change all existing default labels to match that label. Click **Yes** to accept. Costpoint CRM changes all matching labels throughout the system, regardless of what Application Type/Label Type currently appears on the form.

Field	Description
Application Type	Select the type of application for which you want to create custom labels. You can select [All Application Types], or if you want to limit your list, select one of the following: • **Search Types** • **Search Labels (Generic)** • **Report Columns** • **Report Groups**
Label Type	For each application type, you can select [All Types], or if you want to limit your list, select a corresponding label type. For example, if you selected Report Columns in the **Application Type** field, corresponding fields in the **Label Type** field would include Activity List, Activity Summary, Lead Export, Lead List, and so on.
System Labels	
Application Type	Displays a list of all labels for the application type you selected in the **Application Type** field.
Type	Displays a list of the labels for the label type you selected in the **Label Type** field.
Default Label	Displays a list of the default labels for the application and label type you selected.
New Label	Enter the new label. If the label appears on other lookups or reports, Costpoint CRM displays a message asking if you want to change all existing default labels to match that label. Click **Yes** to accept. Costpoint CRM changes all matching labels throughout the system, regardless of what Application Type/Label Type currently appears on the form.

Field	Description
Default Report Heading 1/2	Displays the default report heading. (Default Report Heading 1 is the first or top label heading on the report; Default Report Heading 2 is the second or bottom label heading on the report.) This field only applies to application types of Report Columns and Report Groups.
New Report Heading 1/2	Enter the new report heading. (Default Report Heading 1 is the first or top label heading on the report; Default Report Heading 2 is the second or bottom label heading on the report.) This field only applies to the Report Columns and Report Groups types.
Default Alternate Report Heading 1/2	Displays the default alternate report heading, if applicable. (Default Report Heading 1 is the first or top label heading on the report; Default Report Heading 2 is the second or bottom label heading on the report.) This field only applies to the Report Columns and Report Groups types.
New Alternate Report Heading 1/2	Enter the new alternate report heading. (Default Report Heading 1 is the first or top label heading on the report; Default Report Heading 2 is the second or bottom label heading on the report.) This field only applies to the Report Columns and Report Groups types.

3. To restore system default labels, click **Restore All Default Labels**.
4. Click **Save**. For your changes to take place, log off and log back on to Costpoint CRM.

Create Calculated Fields

Calculated Fields allows you to create custom calculated fields available for selection on all column selection reports. Create custom calculations using any of the existing numeric columns available for a given report. You are able to create your own calculations using the current list of numeric columns for a given report.

Calculations can contain simple expressions, such as **[X] - [Y]** or conditional statements, such as **if org = “CO” then [ytdAmount]**.

Once you save a calculated field, it is available in the column selection like all other columns.

An administrator can create calculated fields for all users, as described in this section; however, individual users can create them for their own individual reports as well. Refer to the Costpoint CRM Reports book in the Costpoint CRM Help system for information about creating calculated fields for individual reports.

You can use Security Roles to restrict access to any calculated fields. *See “Reports Function” on page 188.*

Create Calculated Fields

To create calculated fields:

1. Click **Configuration**, **General**, **Calculated Fields** from the Costpoint CRM main menu. Costpoint CRM displays the Calculated Fields form.
2. Perform one of the following:
   - To create a new field, click **New**, **New Calculated Field**.
   - To create that new field that is similar to a field currently appearing on the form, copy the existing field and then modify it. To do this, click **New**, **Copy Current Calculated Field**.
   - To create that new field that is similar to an existing field, search for and select the existing field and then modify it. To do this, click **New**, **Select Calculated Field to Copy**.
3. Complete/modify the fields on this form:

Field	Description
Folder	Select the reporting area from which you want to select a report. Costpoint CRM lists all the reports associated with that area in the **Report Type** field. If you are creating a calculated field within Configuration, this field appears. If you are creating a calculated field within Reporting, this field does not appear, because you select the report first.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Report Type</td><td>Select the report to which you want to add a calculated field. Costpoint CRM displays all the fields associated with that report in the Fields field.

If you are creating a calculated field within Configuration, this field appears. If you are creating a calculated field within Reporting, this field does not appear, because you select the report first.</td></tr>
<tr><td>Description</td><td>Enter a description of the calculated field. Costpoint CRM highly recommends that the description you enter clearly indicates what the calculated field represents.</td></tr>
<tr><td>Data Type</td><td>Select the type of data contained in the field (Numeric or Currency).</td></tr>
<tr><td>Format</td><td>Select a format for the calculated field. For example, the format #,###.00 [-#,###.00] would appear as 5,400.00 or -5,400.</td></tr>
<tr><td>Width</td><td>Select the width of the field in inches. The default is 1.0.</td></tr>
<tr><td>Heading 1 and 2</td><td>Use these options to specify new heading text for the calculated field. The heading you specify can have one or two lines. If your new heading only requires one line, enter it in Line Heading 2.

If you enter a new heading that is longer than the default, you may need to use the Width option to change the column width.</td></tr>
<tr><td>Fields</td><td>Select the field that you want to use in the calculation. To select a field, double click on it or select it and click Add Field.

Calculations can be simple or complex, and can be created using either the Calculator or the Use a Conditions tool. The result for a calculated field must be a number. Text fields can only be used in conditional statements.</td></tr>
<tr><td>Calculator</td><td>The Calculator tool allows you to create simple calculations using numbers and math calculations. In addition to clicking on the Calculator to select a number of symbol, you can also type in the number or symbol directly in the Calculation grid.

Here is an example of a Contract Summary calculation created with the Calculator:
[JTD Amount] - [Compensation].</td></tr>
</table>

Field	Description
Use a Condition	The Use a Condition tool allows you to create more complex calculations using conditions. To activate the tool, click on the **Use a Condition** checkbox. The following calculation example will show the year-to-date amount for the Boston Office: If this is true: [Office] = "BO" then [Year-to-Date Amount] Else 0 The **Add Period** field in Conditions allows you to add a period to conditional statements. It appears so that you can see that periods have the format YYYYPP (Ex. 200501) in conditions.
Detail Condition	When you use the Use a Condition tool, this field appears in the Calculation grid. This option allows you to determine whether the result of the calculation uses the details of the field (in other words, the various components that makes up that field's number) or the summary of the fields components. Summary is the default (unchecked). When comparing text fields in a condition, for example comparing team data, you would probably want to use this detail option.

4. Click **Save**.

Set Up Holiday Calendar

Use Holiday Calendar Setup to indicate the non-working days and holidays for the current year. You can choose any days as non-working days, but most firms use Saturday and Sunday. You can also insert multiple dates as holidays for the current year. Non-working days and holidays are shaded on user's Activity Calendars in Costpoint CRM.

Multicompany

If you are using the Multicompany feature, you need to set up the calendar for each company. To do this, go to **Utilities**, **Change Company**, and select the next company for which you want to configure the calendar. The name of the active company appears at the top of the Holiday Configuration form.

To set up holidays:

1. Click **Configuration**, **General**, **Holiday Calendar** from the Costpoint CRM main menu. Costpoint CRM displays the Holiday Configuration form.
2. Perform one of the following:
   - To add a new holiday, position the row selector on the row above where you want to add the new holiday, and click **Insert**.
   - To add a new holiday that is similar to an existing holiday, copy the existing holiday and then modify it. To do this, position the row selector on the row you want to copy, and click **Copy**.
   - To delete a row, position the row selector on the row you want to delete, and click **Delete**.
3. Complete the fields on this form, as described below:

Field	Description
Non-working days	Select the days of the week that your firm is normally closed, typically Saturday and Sunday.
Holiday Date	Enter the holiday date, or select a date from the pop-up calendar.
Holiday Type	Select the holiday type label: **Holiday**, **Leave**, **Other**. The type if for informational use only.
Holiday Description	Enter the description of the holiday.

4. Click **Save**.

Set Up Alerts

Alerts are a Costpoint CRM workflow function designed to notify you of changes in the status of opportunities.

How you utilize alerts depends on your role within the team structure (such as contract management or marketing).

Alerts help move information along. For example, a sales team could use alerts to track the status of an opportunity by setting Costpoint CRM to notify the team each time the opportunity status changes — from in progress, to pending, to awarded contract.

Alert Options

Alerts Configuration allows you to determine such rules as:

- When alerts are sent.
- To whom alerts are sent.
- How the alerts are sent (e-mail or dashboard).
- Under what conditions the alerts are sent.
- Contents of e-mail (subject and message body) when alerts are sent via e-mail.

Polling Interval

For CRM alerts to be activated, you need to set the alert polling interval to a level other than zero (0). A value of 60 is recommended. Note that this polling interval only applies if you have the CRM application installed. For all other alerts, the polling interval is system-set and cannot be changed by the user. See “Set Up Alerts Polling Interval” on page 39 for more information.

Types of Alerts

There are two types of alerts. Alerts are triggered either based on a reaction to information defined on your Process Server, or by a change in information in your database.

- **Alerts Triggered by Process Server Reaction**

  The process server:

  - “Wakes up” based on a polling interval configuration setting.
  - Evaluates specific job tables in the database.
  - Reviews the alert configuration to determine whether action is needed.
  - Creates the alert, if action is required.

- **Alerts Triggered by Change in Your Database**

  - Do not depend on schedules defined on the process server.
  - Are triggered dynamically, based on a change in data.
  - A special code is activated when changed data is saved, and
  - Changed data is compared with the alert configuration criteria to determine whether it requires action, and

- An alert is created when it does.

Alerts and Process Servers

For each alert, Costpoint CRM displays process server information, including status (such as Running, Waiting, Complete), time the run started and ended, time of the next run, and the frequency of the run. For most alerts, how often they run is connected to their functionality.

Alert history is now retained. After each run of an alert, the job is retained and the new job is reinserted back into the queue. This allows you to view error messages or to confirm that the jobs are running. Costpoint CRM clears the alerts' queue is on an hourly basis and only the most recent 20 jobs (for successful runs) and 40 jobs (for errors) are retained.

To set up alerts:

1. Click **Configuration**, **General**, **System Alerts** from the Costpoint CRM main menu. Costpoint CRM displays the Alerts Configuration form.
2. Select the alert category from the **Folder** field.
3. Select desired alert from the **Alert** field.
4. Select the **Active** option to enable the alert throughout Costpoint CRM. If no rules exist for this alert, the **Active** field is disabled.
5. Click **Options** to select an existing alert rule or to create a new rule. If a rule has already been assigned to this alert, **<options selected>** appears in this field. See the Costpoint CRM Help system for information about creating rules for alerts.
6. Click **Save**.

Creating Opportunity Estimate Defaults

The Opportunity Info Center Service Estimate feature allows you to create a simple estimate for labor, units, expenses, and/or consultants on-the-fly for your opportunities.

The Opportunity Estimate form in Configuration allows you to enable and create the default settings for this feature. It also allows you to create commonly used clauses to be used on Opportunity Estimate reports.

For information about how to use this feature in Opportunity Info Center, see the Service Estimate Tab of Opportunity Info Center topic in the Costpoint CRM Online Help system.

To set up default settings Service Estimates:

1. Click **Configuration**, **General**, **Opportunity Estimates** from the Costpoint CRM main menu. Costpoint CRM displays the Opportunity Estimates form.
2. Select the General tab.
3. Complete the fields on this form, as follows:

Field	Description
Enable Service Estimate feature	Select this option to enable the Service Estimate feature. The Service Estimate tab appears in Opportunity Info Center and the Opportunity Service Estimate report becomes available.
Estimate Grids	
Enable Units Grid	Select this option if you want the Units grid to appear on the Service Estimate tab of Opportunity Info Center.
Enable Expenses Grid	Select this option if you want the Expenses grid to appear on the Service Estimate tab of Opportunity Info Center.
Enable Consultants Grid	Select this option if you want the Consultants grid to appear on the Service Estimate tab of Opportunity Info Center.
Decimal Digits	
Hour	Select the decimal value for the hour fields. The setting you enter here determines the input and display parameters for the hour values in the grids on the Service Estimate tab. For example, if you select **No Decimal**, hour amounts would appear as **2** (hours); if you select **1 Digit**, hour amounts would appear as **2.5** (hours).

Field	Description
Quantity	Select the decimal value for the quantity fields. The setting you enter here determines the input and display parameters for the quantity values in the grids on the Service Estimate tab. For example, if you select **No Decimal**, quantity amounts would appear as **2** (quantity); if you select **1 Digit**, quantity amounts would appear as **2.5** (quantity).
Amount	Select the decimal or currency value for the amount fields. The setting you enter here determines the input and display parameters for the amount values in the grids on the Service Estimate tab. If you select **No Decimal**, dollar amounts would appear as **50**. If you select **Currency**, dollar amounts would appear in the currency format that your system administrator has set up, for example **50.00**.
Estimate Type	Select the column type. This option determines how many columns display in the respective enabled grids. You have the following options: • **Cost**. Displays only cost columns, such as **Cost Rate**, **Planned Cost**. In the Analysis grid, displays only **Total Cost**. • Billing. Displays only billing columns, such as **Billing Rate**, **Planned Bill**. In the Analysis grid, displays only **Total Bill**. • **Cost and Billing**. Displays both cost and billing columns. In the Analysis grid, displays **Total Cost**, **Total Bill**, **Gross Margin**, and **Gross Margin %**. Opportunity Service Estimate reports are only available if you select Billing or Cost and Billing.
Default Cost [Labor] Category Table	This option is only available if you selected **Cost** or **Cost and Billing** as the **Estimate Type**. Select the default table for the Service Estimate from the drop-down list. Only those tables that have been selected as Available for Project Planning appear on this list (if Project Planning is owned and Configuration is set to enterprise-wide rather than company specific). This table can be overwritten in Opportunity Info Center.

Field	Description
Default Billing [Labor] Category Table	This option is only available if you selected **Billing** or **Cost and Billing** as the **Estimate Type**. Select the default table for the Service Estimate from the drop-down list. Only those tables that have been selected as Available for Project Planning appear in this list (if Project Planning is owned and Configuration is set to enterprise-wide rather than company specific). This table can be overwritten in Opportunity Info Center (assuming there isn't a Resource Planning role security setting disallowing this).
Expense Billing Multiplier	If the Expenses grid is enabled and the **Estimate Type** is **Cost and Billing**, then Costpoint CRM automatically applies the value you enter here to the Planned Cost to extend the Planned Billed amount for reimbursable expenses. This value can be overwritten in Opportunity Info Center.
Consultant Billing Multiplier	If the Consultants grid is enabled and the **Estimate Type** is **Cost and Billing**, then Costpoint CRM automatically applies the value you enter here to the Planned Cost to extend the Planned Billed amount for reimbursable expenses. This value can be overwritten in Opportunity Info Center.

4. Select the Clauses tab.

   The Clauses tab allows you set up and save clauses that can be used in Opportunity Service Estimate reports. The codes/clauses you enter here appear as selectable options when you are setting up the Opportunity Service Estimate report.

   You can set up separate clauses here for both the top and bottom of the report (the top/bottom options are available on the General tab in the Opportunity Service Estimate report). For example, a top clause may read "Please quote us your firm price for the following goods." A bottom clause may read "Please indicated all prices FOB our place of business."

5. Complete the fields on this form, as follows:

Field	Description
Code	Enter the code for the clause, for example: RFQTOP.
Clause	Enter the clause, for example: Please quote us your firm price for the following goods. Use the Text Editor icon in this field to format the text.

6. Click **Save**.

3 Info Centers

In this chapter

- Overview
- Types of Info Centers
- Using the Costpoint CRM Info Center
- Screen Designer

Overview

The Costpoint CRM Info Center provides you with the tools you need to manage all of your business-related data. From opportunities and contracts, to customers, contacts, employees, and even a document library, the Info Centers allow you to enter, view, and revise your data in one convenient location. Further, the Info Centers are fully integrated and designed to work together to make it easier for you to find and use the data you need.

Use the Info Center to:

- Add records
- Associate
- Copy records
- Create record groups
- Delete records
- Edit records
- Link external files to records
- Merge records
- Print records
- Schedule activities

Your company can configure the Costpoint CRM Info Centers to meet specific business requirements. Therefore, some of the Info Center names, tabs, and fields in your application may differ from those described here. Contact your system administrator for further information.

Info Centers and Configuration

In general, you must enter Info Center data before selecting Configuration options. However, the values you enter in certain Info Center fields depend on choices you make in Configuration. Therefore, you may need to return to certain Info Center fields once you finish Configuration.

Types of Info Centers

The following Info Centers are available in Costpoint CRM:

- Opportunities Info Center
- Customers Info Center
- Vendor/Partners Info Center
- Contacts Info Center
- Campaigns and Leads Info Center
    - Marketing Campaigns
    - Leads
- Knowledge Management
    - Employees

  •Contracts

  •Document
- Units Info Center
- Accounts Info Center
    - Chart of Accounts

This section gives you a brief description of each Info Center. See the Info Center book in the Costpoint CRM Help system for complete information about each Info Center.

Opportunity Info Center

The Opportunity Info Center contains information about future contract opportunities your company is interested in pursuing.

Use the Opportunity Info Center to maintain all opportunity information, including names, addresses, phone numbers, related activities and files, current opportunity status, opportunity team members, contract codes, and opportunity contacts.

Note that when an opportunity becomes a contract, you can easily post all the information stored in the opportunity record to a new contract record in the Contract Info Center.

Customer Info Center

The Customer Info Center contains information about your company's current and prospective customers.

Use the Customer Info Center to maintain all customer information, including addresses, phone numbers, contact names, related activities, customers, and files, links to ongoing and completed contracts, and details about future opportunities.

Vendor/Partner Info Center

The Vendor/Partner Info Center contains information about the vendors, partners, and consultants from whom your company acquires the materials and services needed to complete your contracts.

Use the Vendor/Partner Info Center to maintain all vendor/partner information, including addresses, phone numbers, contact names, related files, links to ongoing and completed contracts, and details about future opportunities.

Contact Info Center

The Contact Info Center contains information about the people who serve as your company's contacts at customer companies or consultant firms.

Use the Contact Info Center to maintain all contact information, including names, addresses, phone numbers, related activities and files, links to ongoing and completed contracts, and details about future opportunities.

Marketing Campaign Info Center

The Marketing Campaign Info Center contains marketing campaign information, including a campaign's team, goals, budget, and activities, as well as the leads, opportunities, and contracts generated from the campaign.

You can associate a marketing campaign with a contract, opportunity, lead, or contact; once you do, the association also appears on the Marketing Campaigns tab of the Contract, Opportunity, Lead, or Contact Info Center.

You can create a promotional contract and link to it from a marketing campaign. Once you update campaign costs in the contract record, you can view them from the marketing campaign record.

Lead Info Center

The Lead Info Center contains information about the people and companies who have come to your company's attention as "leads" to future business with potential customers. A lead is essentially a contact who can be qualified and cultivated to help your firm learn about new opportunities, and ultimately, to win new contracts.

The Lead Info Center provides you with a separate location for storing and managing the records of contacts who are marketing-related. For example, if your firm rents or purchases lists of marketing prospects, you can import those lists to the Lead Info Center and manage such contacts from there, rather than commingling them with your Contact Info Center records.

Use the Lead Info Center to maintain contact information, including names, addresses, phone numbers, related activities and files, links to ongoing and completed contracts, and details about future opportunities.

Employee Info Center

The Employee Info Center contains information about the personnel who work for your company, including personnel in any branch offices and consultant firms.

Use the Employee Info Center to maintain all employee information, including personal data, general descriptions of employee skills and experience, details about the customers and contacts with whom employees are working, the opportunities and contracts they are working on, and related activities.

Contract Info Center

The Contract Info Center contains information about your company's current and completed contracts.

Use the Contract Info Center to maintain all contract information, including contract names and locations, contract costs, estimated and actual completion dates, associated customers, contacts, and consultants, details about the team members working on contracts, contract activity details, and related files and graphics.

Document Info Center

The Document Info Center contains saved text and file links that you can access when creating custom proposals, resumes, and reports.

Use the Document Info Center to store commonly used text passages for insertion into custom proposals, employee resumes, or contract reports. You can store text items directly in the Document Info Center or save links to external documents and graphic files.

Account Info Center

The Account Info Center is available for use with Opportunity Estimates. Use it to store the accounts in your Chart of Accounts.

Unit Info Center

The Unit Info Center is available for use with Opportunity Estimates.

Deltek Costpoint CRM stores units within unit “tables,” which enable you to efficiently organize and maintain your unit information.

Using the Costpoint CRM Info Center

This section provides basic information about managing your Info Center Records.

For additional information about each of the Costpoint CRM Info Centers, go to the Costpoint CRM Help system and click the **Help** button on the toolbar of any Info Center record.

Finding Records

Lookup and search capabilities provide you with various ways to find Info Center records in your database.

The two principal ways to search for Info Center Records are:

- Info Center Search Tool
- Individual Info Center Search

Info Center Search Tool

The Info Center Search tool is a feature that allows you to locate records by searching multiple Info Centers simultaneously. To access the Info Center Search tool, click on the **Search** icon on the Costpoint CRM toolbar. Costpoint CRM displays the Info Center Search dialog.

The Info Center Search tool only retrieves records to which you have security access rights.

The Info Center Search dialog consist of two tabs:

- **Options**. Use this tab to select the Info Centers you want to search, enter search text, and specify what record values to search on.
- **Results**. This tab displays the results of your search.

To search for records, select the Info Centers you want to search using the checkbox in the **Search** column on the Options tab. Then, use the **Search Column** field to select the record values you want to search on—for example, contract number, customer name, employee last name, and so on. When you access the Info Center Search dialog, the **Search Column** contains default search values for each Info Center. To change the search values, click in the **Search Column** and then click the **Ellipsis** icon. Costpoint CRM displays a list of available columns for the selected Info Center, as shown in the example below.

Finally, enter a full or partial search value in the **Search Text** field and click the **Search** button. Costpoint CRM searches your database for records that contain the value entered. Costpoint CRM then displays a list of all matching records (customers, contacts, leads, marketing campaigns, employees, contracts, vendors/partners, and documents) on the Results tab.

The example above shows the results returned using “Department of Defense” as the search text. You can click on a record name in the list on the Results tab to open the corresponding Info Center record.

Individual Info Center Search

You can also search for Info Center records of a particular type by opening an Info Center and using one of three tools (available in all Info Center record types). To access these search features, click **Info Center** from the Costpoint CRM main menu and then click the name of the Info Center you want to open.

To find a record of the type selected, complete one of the following procedures:

- Enter a full or partial value in the **Find** field of any Info Center (using either numbers or letters), and then press **Enter**. Costpoint CRM searches your database for record numbers and/or names that contain the value entered. If more than one matching record is found, Costpoint CRM displays a list of matching records. If only one matching record is found, Costpoint CRM opens the record.

The following lookups are available: Customer, Contact, Lead, Marketing Campaign, Employee, Contract, Vendor/Partner, and Document.

- Click  in the **Find** field of any Info Center to search for records using a Lookup. The Info Center currently open determines the type of Lookup that displays.
- Click on the **Folder** icon beside the **Find** field of any Info Center to search for records using a saved search.

Opening Records

When you access one of the Info Centers, Costpoint CRM retrieves the last record opened in the current browser session. A browser session begins when you log on to Costpoint CRM, or when you open a Costpoint CRM application in a new browser window. A browser session ends when you close the browser window. If this is your first visit to the Info Center for the current browser session, Costpoint CRM opens a blank record.

There are two methods available for opening a record.

- Open a record in the current browser window.

  Click **Info Center** on the Costpoint CRM main menu and then click an Info Center option from the menu tree. Costpoint CRM opens the selected Info Center in the current browser window. You can then select a record to open.

  If you open a record using this method, Costpoint CRM closes the application or record you currently have open.

- Open a record in a new browser window.

  Click **Info Center** on the Costpoint CRM main menu, right-click an Info Center option from the menu tree, and then click the **Open in New Window** pop-up option. Costpoint CRM opens the selected Info Center in a new browser window. You can then select a record to open.

Using this method allows you to open records without exiting the application or record you currently have open.

Creating and Deleting Records

There are several methods available for creating new records.

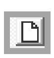
The following methods are available in all Info Centers:

- Create a new record from scratch.
- Copy an existing record, modify the copied record, and then save the modified copy to create a new record.

Open any Info Center and use the toolbar to select the appropriate option when creating a new record.

Additional methods for creating new records.

- In the Contract Info Center, you can also create a new contract record from an opportunity record or a contract template.
- In some Info Centers, you can create new records “on-the-fly” from certain tabs — using the **Add-on-the-Fly** icon or the **New** grid option. This feature allows you to create a record in a separate browser window while keeping the current record open in your main browser window.



Add-on-the-Fly Icon

- After you create or edit a record, you must click **Save** on the toolbar to save your entries.
- To delete a record from your database, open the record and click **Delete** on the toolbar. Costpoint CRM displays a Confirm Delete dialog. Click the **Yes** button on the dialog to delete the record.
- To delete multiple records from your database, use the Batch Deletes utility (**Utilities**, **Advanced Utilities**, **Batch Deletes**).

Duplicate Record Check

Click the Help button on the dialog to learn more about the duplicate record check.

When you create a new Info Center record, Costpoint CRM automatically checks your database for possible duplicate entries. Costpoint CRM displays a list of existing records that match, or closely match, the name of the record you are trying to create.

Printing Records

There are three methods available for printing records:

- Print the current record.
- Print a record not currently open (within the same Info Center).
- Print all records currently open (within the same Info Center).

Open any Info Center and use the toolbar to select the appropriate option when printing a record.

Data Entry and Record Associations

Data is entered and stored in the Info Center using a series of tabs. The tabs may contain data fields and/or data grids.

Many data grids — and some data fields — are relational, which means that when you enter data in one record, a corresponding entry is made in another record. The resulting record association may create a link between data grids in each record, or between a data grid in one record and a data field in another record.

- Use data fields to enter data.
- Use data grids to add data to a record and/or to create associations between records. The grid options available depend on the Info Center and grid type you have open. Grid options include:
  - **Associate**. Add a record association to a grid.
  - **New.** Create a new record and add an association to a grid.
  - **Edit**. Modify an association on a grid.
  - **Remove**. Delete an association from a grid.
  - **Insert**. Add an item to a grid.
  - **Delete**. Remove an item from a grid.

To learn how record associations work, see the examples on the following pages.

Grid to Grid Association Example

You can sort data on an Info Center grid by any one of the available columns on the grid. Click on a column heading to establish a sort order (ascending or descending). Click on the column heading again to reverse the sort order.

If you add Stephen Anderson to the Employees grid on the Associations tab of the Department of Defense customer record, the Department of Defense is automatically added to the Customers grid on the Associations tab of Stephen Anderson's employee record.

The following example shows the Employees grid on the Associations tab of Customer Info Center and the Customer grid on the Associations tab of Employee Info Center.

Right-click on a hyperlink and click the Open in new window option to open the associated record in a new browser window.

The entries in both records display as hyperlinks. This means that you can click on either entry to open the associated Info Center record. For example, if you open the customer record for the Department of Defense and click on Stephen Anderson's name in the Employees grid, Costpoint CRM opens Stephen Anderson's employee record.

Grid to Field Association Example

You can sort data on an Info Center grid by any one of the available columns on the grid. Click on a column heading to establish a sort order (ascending or descending). Click on the column heading again to reverse the sort order.

If you add Richard Bowden to the Contacts grid on the Contacts tab of the Department of Defense record, the Department of Defense is automatically entered in the Customer field on the General tab of Richard Bowden's contact record.

The following example shows the Contacts grid on the Contacts tab of Customer Info Center and the **Customer** field on the General tab of Contact Info Center.

Right-click on a hyperlink and click the Open in new window option to open the associated record in a new browser window.

The entries in both records display as hyperlinks. This means that you can click on either entry to open the associated Info Center record. For example, if you open the customer record for the Department of Defense and click on Richard Bowden's name in the Contacts grid, Costpoint CRM opens Richard Bowden's contact record.

Contract Work Breakdown Structure (WBS)

You can define up to three levels for your Costpoint CRM WBS.

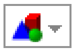
One of the most significant features in Costpoint CRM is the ability to define up to three levels for your contracts' WBS. This gives you added flexibility when setting up and managing your contracts.

The default labels for the WBS levels in the contract Info Center are:

- WBS1 = Contract
- WBS2 = Phase
- WBS3 = Task

To add a phase (after you have created a contract record), click **New**, **New Phase** on the contract Toolbar. To add a task to a contract (after you have created a contract and a phase), click **New**, **New Task** on the contract Toolbar.

Phase/Task Lookup



Phase Task Icon

If a contract has phases and/or tasks, a small icon displays to the left of the contract name and number. Click on this icon to display a list of phases and tasks, and then click on a phase or task in the list to access the phase or task information.

Once you have opened the Phase/Task Lookup, you can click the  **Note Pin** icon at the upper right of the lookup to “pin” the lookup to the contract record so that it remains visible while you have the record open. The following page shows the Contract Info Center with “pinned” phase/task.

Screen Designer

Overview

For information about other ways to customize Costpoint CRM, see "About Customizing Costpoint CRM" on page 17.

The Screen Designer allows you to design your own tabs in Info Centers and Activity Manager. You open up a tab in "design mode" to perform a variety of actions, including the following:

- Resize and move existing fields and labels.
- Change existing field labels and add new ones.
- Change the order of tabs on the screen
- Determine whether fields should be hidden or locked, based on Security role.
- Determine whether fields are required for CRM and Accounting.

This combination of design options allows your company to tailor its information to meet the security and information requirements of each user.

When you access the Designer, there may be more fields in the Designer than on the tab. This is because in Designer, all fields appear regardless of what application you have purchased. Keep this in mind when arranging fields.

> Note that in Info Centers, you can use the Designer to customize all the tabs. In Activity Manager, you can use the Designer to customize the Detail, Attendees, Contacts, Leads, and Recurrence tabs on the Activities dialog.

Screen Designer User Defined Help

You can use the Screen Designer to easily create your own pop-up help messages for tabs or fields. These help features allow your company to ensure better business rules, specify more detailed instructions, and even supply links to other documents or Web addresses.

There are two ways in which you can create help:

- **Tool Tip**. Allows you to add help text to any of the fields on the tab. When a user hovers over the field, the text associated with the field appears. A tool tip consists of unformatted text
- **Help Buttons**. Allows you to place a Help button anywhere on a tab. Then using the Costpoint CRM rich text editor, you can associate any amount of formatted text with each button. When a user clicks on the button, the text appears.

Screen Designer and Security

Only those employees with an Admin type role can access the Designer. There is not a separate Security role for the Designer.

Screen Designer and the User Defined Tabs Application

You can use the Screen Designer in conjunction with the User Defined Tabs application. The User Defined Tabs application allows you to add new tabs, and then add fields and grids to this tab. Then use the Designer to organize the added tab elements.

Customize Tabs with the Screen Designer

To use the Screen Designer:

1. Select the tab you want to customize.

When you right-click on the name of the tab, the other option Show tab order, allows you to view the tab sequencing order of the fields on the tab. For more information about tab sequencing, see page 3-119.

2. Right-click on the name of the tab, then click **Design**. Costpoint CRM displays the Design form for that tab.
3. To restore tabs and fields to their original default settings, select the tab elements and click the **Restore Defaults** icon**.** Original settings mean what was shipped with Costpoint CRM and then changed in User Defined Tabs:
4. Use the application workspace lines which show you the amount of screen space available on the tab page for different display resolutions. For example, if your display resolution is 1024 x 768, then you must keep all labels and fields within the area-defined workspace lines labeled 1024 x 768. If you place labels or fields outside this area, Costpoint CRM displays scroll bars on the tab page.
5. Refer to the sections below to design the tab to meet your company's needs.
   - “Working with Fields” explains how to select, resize, and align fields, among other things. It also discusses tab sequencing, drop-down list fields, and command buttons.
   - “Working with Group Boxes” explains what a group box is and how to add fields to it.
   - “Working with Grids” explains how to change both the label of the grid and the labels for the column headings.
   - “Security and the Tab Designer” discusses how to make a field either locked or hidden, based on Security role. It also explains how to make a field required for CRM and Accounting.
6. When finished, click **OK** to save changes.

Working with Fields

There are several types of fields on Costpoint CRM tabs, such as input fields and checkbox fields. These instructions apply to all types unless otherwise noted.

Field/Function	Description
Selecting Fields	**Selecting Single Fields** To change a field, you need to first select it. To select a field, simply click on it. Costpoint CRM displays the data for that field in the Properties pane. The data that you can change appears in black; the data that you cannot change appears grayed out. You can also select a single field by selecting the field name from the Properties menu. The names that appear in this list are actual HTML IDs associated with each element. **Selecting Multiple Fields** You can also select multiple fields. You would want to do this if you want to move, align, or otherwise affect two or more fields at the same time. When you select multiple fields, <Multiple Selections> appears in the Properties pane.
	To select more than one field, you can: • Click on the first field, then hold down the **Ctrl** button while clicking on the subsequent field(s). • Lasso the fields by holding down the left mouse key and dragging around the fields. • Click the **Select All** icon to select all the fields.

<table>
<tr><th>Field/Function</th><th>Description</th></tr>
<tr><td>Resizing Fields</td><td>To resize a field, first select the field. The size of the field appears in the Properties pane (sizes are displayed in pixels). If the Height or Width size is grayed out, then you cannot change that aspect of the size. For example, sometimes groups of input fields are hard-coded to be the same height.

If the Height or Width size is in black, then resize arrows appear on the selected field: on the right (for width), bottom (for height), and bottom right corner (for both). Drag the height or width of the field to the desired height or width. You can also change the size of the field by entering the new size in the Height and Width fields in the Properties pane.

Notes

• You can resize multiple fields at the same time by selecting those fields and then entering the appropriate data in the Properties pane. However, if that aspect of one of the fields (i.e., Width) cannot be changed, Costpoint CRM changes only the fields that it can.

• Checkboxes cannot be resized.</td></tr>
<tr><td>Moving Fields</td><td>You can move a field in one of two ways:

• Select the field and drag it to the new position.

• Select the field and enter the numbers of its new location in the Position fields. The numbers in these fields represent the number of pixels from the left and top of the tab.

Notes

• If you move a field, the data in that field is not affected.

• You can move all the fields on the tab at the same time by selecting the Select All icon and then dragging the fields to the new position.</td></tr>
</table>

Field/Function	Description
Labeling Fields	You to change the label for a field. For example, you may want to change the **Fax** label to **Fax Number**. To relabel a field, select the label for the field. The information for that label appears in the Properties pane. Enter the new label in the **Caption** field. **Notes** • Labels for command buttons (for example, **Add Address, Delete Address**) cannot be changed.
Adding New Field Labels to Tabs	To add a new field label on the tab, click on the **New Label** icon. A custom label appears in the upper left corner of the form. Move the new label to the desired location and relabel the field by entering the name in the **Caption** field. The labels you add using the **Custom Label** feature are not associated with any input field.
Aligning Fields	To left align multiple fields, select the fields and click on the **Align Left** icon. Costpoint CRM aligns the fields to the last field you selected. To right align multiple fields, select the fields and click on the **Align Righ**t icon. Costpoint CRM aligns the fields to the last field you selected. To top align multiple fields, select the fields and click on the **Align Top** icon. Costpoint CRM aligns the fields to the last field you selected. To bottom align multiple fields select the fields and click on the **Align Bottom** icon. Costpoint CRM aligns the fields to the last field you selected.
Making Multiple Fields the Same Height/Width	To make multiple fields the same width, select the fields and click on the **Same Width** icon. Costpoint CRM makes the fields the same width as the last field you selected. To make multiple fields the same height, select the fields and click on the **Same Height** icon. Costpoint CRM makes the fields the same height as the last field you selected.

Field/Function	Description
Deleting Field Labels	Only those field labels that you created in the Designer can be deleted using the Designer. To delete a field label, select it and click the **Delete** icon. **Notes** • You cannot delete standard field labels. • If you created fields for this tab in the User Defined Tabs application, you need to go to that application to delete them. • You cannot delete the actual input portion of the field using Designer. To do that, you need to use the User Defined Tabs application (see page 1-8).
About Checkboxes	Checkboxes are those fields in which you click inside the box to select it, for example:  You can move a checkbox and change its label. However you cannot change its size.
About Command Buttons	Command buttons are fields that allow you to perform an action, for example:  You can move command buttons, however you cannot change the size or the label of the button. You can hide command buttons, but you cannot lock them. See "Security and the Screen Designer" on page 121 for information about hiding and locking fields.
About Drop-Down List Fields	Drop-down list fields are fields in which you can select from a predetermined list, for example:  In the Designer, when you resize a drop-down list field, it does not affect the width of the opened drop-down list.

Field/Function	Description
About Tab Sequencing	Tab sequencing is the order in which fields on a tab are accessed by pressing the **Tab** key. When you are designing your tabs, you may want to take tab sequencing into consideration when positioning your fields. Costpoint CRM basically creates sequential tabbing within groups of closely aligned fields (and within group boxes). Costpoint CRM looks at the fields, beginning at the top left portion of the tab; when it has finished with those fields, it looks for fields to the right of those fields. If none exist, it looks for fields below. Once you finish designing your tabs, you can see if the tab sequencing order is logical by selecting the Info Center tab, right clicking on it, and selecting **Show tab order**. Costpoint CRM displays red numbers for each field element indicating the order. To turn this feature off, simply reselect it (uncheck it).

Working With Group Boxes

A group box consists of the box around a group of fields and the label of the group box if one was added. For example, you may have a group box labeled Address, which surrounds **Street Address**, **City**, **State**, and **Zip** fields.

- The fields within the group box are not “linked” to the group box. In other words, if you move the group box, the fields within the box remain in the same place.
- To select the group box, along with all the fields within the group box, lasso the entire group box or hold down the **Shift** key and click anywhere within the group box.

Field/Function	Description
Adding Group Boxes	To add a group box, select the **New Group Box** icon. A new group box appears in the upper left corner of the form. To move the box to its correct position, either: • Select the box and drag it to the new position. • Select the box and enter the numbers of its new location in the **Position** fields. The numbers in these fields represent the number of pixels from the left and top of the tab. Resize the box by dragging the outlines of the box to the correct height/width, or by entering the appropriate pixel size in the **Height** and **Width** fields.
Labeling Group Boxes	Select the group box to which you want to add a label. Enter the label in the **Caption** field. The label appears in the upper left side of the group box.
Adding Fields to Group Boxes	To add fields to group boxes drag the desired fields into the group box and arrange as needed.
Deleting Group Boxes	The Designer allows you to delete group boxes that you have added using the Designer, and you can delete these at any time. To delete a group box, select it and click on the **Delete** icon.

Working with Grids

Grids allow you can insert multiple entries. For example, the Accounting tab in Employee Info Center contains two grids: Benefits Accrual and Direct Deposit. In both of these, you can insert, copy, or delete multiple entries.

When you select a grid in the Designer, a Columns pane appears which allows you to change information about the column fields within the grid. For example, the Benefits Accrual grid contains three grids: **Benefit Accrual Code**, **Hours Per Year**, and **Change Date**. For each of these columns, you can determine whether the column is locked or required.

When editing grids, keep in the mind that the settings in the Properties pane apply to the overall grid; the settings in the Columns pane apply to the column headings within the grid.

Field/Function	Description
Resizing Grids	You cannot resize grids using the Designer application. The width of the grid will always be autosized to fit the width of the window. However, if you want to add more rows to the grid, you can do so in the User Defined Tabs application (see page 1-8).
Moving Grids	To move the grid, either: • Select the grid and drag it to the new position. • Select the grid and enter the numbers of its new location in the **Position** fields. The numbers in these fields represent the number of pixels from the left and top of the tab.
Changing Grid Labels	Select the desired grid for which you want to change the label. The information about that grid appears in the Properties pane. Enter the new label in the **Caption** field.
Changing Column Headings in Grids	To change column headings in grids, select the column heading. The information about that heading appears in the Columns pane. Enter the new heading in the **Caption** field. Note that if the selected grid has only one line of text for each heading, only one **Caption** field appears. If the grid supports two lines of text per heading, two **Caption** fields appear, and so on.

Security and the Screen Designer

You can determine, by security role, whether or not you want fields to be hidden and whether or not users are allowed to enter data in fields. You select and apply the role(s) to the field that you do not want to have access to the field.

For example, if you created a security role for project managers and you did not want Contract Managers to be able to change a client's status, you would select the **Status** field, click **Locked**, and select Contract Managers from the drop-down list of roles. You can also select **<All Roles>**. When you select this option, any new roles that are added in the future will be excluded as well.

In addition to hiding and locking fields, you can also determine whether the field is required.

Field/Function	Description
Security	
Creating Locked Fields	The Designer allows you to determine, by security role, whether or not you want a field to be locked. Locked fields can still be seen by the user, but no action can be taken. All screen elements can be locked, including input fields, grids, and column headings within grids. To lock a field, select the field and click on the **Locked** field. Select the role to which you want to apply the locked status. **Notes** • Make sure that you do not lock required fields. • When you are locking a field, select the input portion of the field, rather than the label for that field. • When you lock a grid, the commands for the grid (i.e., **Insert**, **Copy**, **Delete**) are disabled. When you lock column headings within a grid, the commands are not disabled.
Creating Hidden Fields	The Designer allows you to determine, by security role, whether or not you want a field to be hidden. Hidden fields cannot be seen by the user. All screen elements can be hidden. To hide a field, select the field and click on the **Hidden** field. Select the role to which you want to apply the hidden status. **Notes** • Make sure that you do not hide required fields. • When you hide a field, don't forget to hide both the input portion of the field and the label for the field.
Required	To make a field required, select **Yes** from the **Required** field in the Properties pane.

Using the Designer to Create User Defined Help

You can use the Screen Designer to easily create your own online help topics for tabs. These help features allow your company to ensure better business rules, specify more detailed instructions, and even supply links to other documents or Web addresses.

There are two ways in which you can create help:

- **Tool Tip**. Allows you to add help text to any of the fields on the tab. When a user hovers the mouse over the field, the text associated with the field appears. A Tool Tip consists of unformatted text.
- **Help Text Icon**. Allows you to place a Help Text icon anywhere on a tab. Then using the Costpoint CRM rich text editor, you can associate any amount of formatted text with each button. When a user clicks on the icon, the text appears.

Creating Tool Tips

Screen Design Tool Tip allows you to easily create field-level user-defined help for your Info Center tabs. You can create tool tips for most tab fields including input, drop-down, and checkbox fields. Once you have created a tool tip for a field, a user can view the tip by hovering the mouse pointer over the field.

To add a tool tip:

1. From within the Designer, select the field to which you want to add a tool tip (Select the input portion of the field, not the label of the field.) The **Tool Tip** field in the Properties pane becomes active.
2. Enter the help message in the **Tool Tip** field.
3. Click **OK**.

Screen Designer Help Icon Feature

The Help Text icon

The Screen Designer Help Text icon feature allows you to easily create user-defined help for your tabs. Unlike the Tool Tip, Help Text allows you to format the text, as well as insert links to other help areas. Once you have created a Help icon, a user can view the help by clicking on the icon. You can add as many Help Text icons as you like to the tab.

You can use the Help Text icon in the following ways:

- Place it next to a field, where users can click on it to get detailed or specific information for that field.
- Place it in a neutral part of the tab, where users can get more information about that particular tab.
- Use it for supplying users links to other documents and Web pages. For example, if a field required a business-defined code, you could place the Help icon next to that field. When the user clicks on the icon, the help text would contain the link to the list of codes.

- Place a label next to it using the New Label icon, for example **Click here for list of codes**.

To add a Help icon:

1. From within the Designer, click on the New Help Text icon. Costpoint CRM places a Help Text icon in the upper left part of the tab.
2. Move the icon to the desired location.
3. Enter the help message in the **Help Text** field. If you want to format the text using the Text Editor, click on the **...** button in the **Help Text** field.
4. Click **OK**.

4 Set Up Work Breakdown Structure

In this chapter

Overview

A work breakdown structure (WBS) divides each of your contracts into distinct, manageable work elements in a way that balances management needs with the need to collect an appropriate and effective level of contract data. A WBS is used by various groups in a firm, such as marketing, business development, and contract management. A well-planned WBS is integral to successful contract proposals, planning, scheduling, and reporting.

For more information about the Costpoint CRM WBS, see the Concepts book in the Costpoint CRM Help system.

The Costpoint CRM Work Breakdown Structure

The Costpoint CRM work breakdown structure reflects how your firm chooses to structure contract data within Costpoint CRM.

The Costpoint CRM default term for work done by your firm is contract. You may refer to a contract using another term, such as case, or job. You can tailor this and other labels throughout Costpoint CRM to meet your firm's needs. See “Set Up Field Labels” on page 29.

Your Costpoint CRM work breakdown structure impacts the:

- Value you get from the data you store.
- Ability to leverage past work to generate new business.
- Ability to improve job performance based on past experience.
- Ease and quality of knowledge sharing among groups in your firm.
- Quality of service and level of reporting and billing customization that you can provide to your customers.

There are two key components to the Costpoint CRM WBS, which work together to provide a comprehensive tracking and reporting. Before you begin to set up your firm’s work breakdown structure within Costpoint CRM, you must understand how the components work together to provide a structure that gathers and stores information to meet your firm’s internal and external reporting needs.

The two components are:

- The team structure.
- The WBS or contract structure.

In addition to the two key components of the WBS, Costpoint CRM includes other codes, such as customer numbers, whose structure you must plan before beginning to use Costpoint CRM. Although these numbers do not directly relate to the WBS, because Costpoint CRM is an integrated system, you may want to consider your WBS structure when structuring other Costpoint CRM numbers.

Considerations When Planning Your Work Breakdown Structure

There are four key considerations when planning your work breakdown structure (WBS):

- **Contract stipulations**. You should consider your firm's contractual obligations for reporting when planning your WBS. For example, if the contract requires that you generate reports for each phase of a contract, then you must use a two-level WBS structure to track the contract as a whole, as well as each of it’s phases.
- **Team structure of your firm**. Your firm structure and the way different departments or offices work together contributes to the WBS. For example, if your firm has multiple business units that will collaborate on the same contract, you could configure team codes to represent each office, and then associate the appropriate WBS levels with the appropriate office.
- **Costpoint CRM applications you use**. Depending on which Costpoint CRM applications you use, your information needs may change.
- **Needs of various roles within your firm**. Different groups within your firm, such as marketing, contract management, and contract planning have different needs for contract information. You should consider the information each group needs when planning your WBS.

Structure of Work Breakdown Structure (WBS) Components

After you understand the Costpoint CRM Work Breakdown Structure, and you decide how your firm will use it and how simple or complex your WBS will be, you can decide how you will structure the components of your work breakdown structure.

Deltek Costpoint CRM allows you to create a firm-wide WBS with up to three major levels of detail, if you use phases and tasks, and with up to seven levels of detail, if you use delimiters. You can break down your contracts further using labor codes.

At the firm-wide level, you specify the following during installation and setup:

- Maximum number of WBS levels that can be used for any contract (up to three).

  The number of WBS levels available on a firm-wide basis is determined by the length set for phase and task numbers during installation, or key conversion. If the firm-wide phase length is set to 0 (zero), all contracts are limited to a WBS of one level. If the firm-wide task length is set to 0 (zero), all contracts are limited to a WBS of two levels.
- Labels to use for each level.
- Format of the values for each level, including maximum lengths and number of delimiters.
- Whether or not to use leading zeros to force the uniformity of contract number length.

At the contract level, you can choose to use less than the maximum number of WBS levels allowed, but you must conform to the format for length and delimiters specified at the firm-wide level. If your firm chooses to use leading zeros, all contract number lengths will be made uniform by Costpoint CRM.

Structure of Components

You use delimiters, work breakdown structure levels, and labor codes to construct your firm-wide work breakdown structure. Be aware that all measurable contract detail is tracked at the lowest level of the work breakdown structure, whether that be contract, phase, task, or labor code.

In addition to the WBS components, other Costpoint CRM components are closely tied to the work breakdown structure, because they affect contract control, customer relationship management, and customer control operations in Costpoint CRM. Because of this, it is important to consider the structure of these related Costpoint CRM components, as well as the key WBS components.

Component	Structure
Team Codes	A team code is a code that represents a business unit or diCostpointCRM in your firm. You can have up to a five-level team code structure. The total length is up to 14 characters, including a user-defined delimiter to separate each level for entry and reporting purposes.
Delimiters	A delimiter is any special character (usually a period) used as a separator. Valid delimiters are: • tab • . (period) • : (colon) • - (dash)
WBS Levels	WBS levels are the backbone of your Work Breakdown Structure. See the Costpoint CRM Help system for information about default, maximum, and minimum lengths to consider when defining your firm-wide lengths for each level. WBS Level values are hierarchical, meaning the level two (phase) number is one delimiter greater than the level one (contract) number, and the level three (task) number is one delimiter greater than the level two (phase) number. For example: • Contract Number 9300. • Phase Number 9300.01 • Task Number 9300.01.01 Because of this hierarchy, you can have the same WBS level value for multiple contracts, or the same WBS level value for multiple phases, yet each phase is associated only with the appropriate contract, and each task is associated only with the appropriate phase. Don't confuse contract, phase, task hierarchy with using delimiters. If you use contract, phase, and/or task delimiters as well as phases and tasks, you can have up to six delimiters and seven segments in your WBS number. See the Work Breakdown Structure Concepts book in the Costpoint CRM Help system for further details.

Other Important Costpoint CRM Numbers

In addition to the main components you use to create your work breakdown structure, you must establish a structure for other numbers or codes used throughout Costpoint CRM. Your firm's requirements for structuring these additional numbers and codes, such as vendor/partner numbers or team codes, may impact decisions you make about your work breakdown structure.

Refer to this table for an overview of the WBS-related Costpoint CRM components.

Number	Description
Customers	Customers are the firms for which you complete your contracts. Customer numbers are numbers associated with customers in Costpoint CRM.
Opportunities	An opportunity record stores information about potential contracts, including names, addresses, phone numbers, related activities and files, current opportunity status, opportunity team members, contract codes, and opportunity contacts. You cannot change Costpoint CRM's firm-wide default opportunity number structure, which is a maximum of 20 characters.
Employees	Employees are those people at your firm who complete the work on a contract. Each employee must have an employee number. This number is used throughout Costpoint CRM to track the employee's contact information and contract participation.
Vendor/Partners	Vendor/partners are the people or businesses from whom your firm acquires the materials and services needed to complete your contracts. If you use vendor/partners with the Customer Relationship Management (CRM) and Proposals applications, the term “vendor/partner” may be used to represent someone who does work for you, like a contractor or consultant.

5 Set Up Proposals

In this chapter

Overview

Costpoint CRM Proposals streamlines streamlines production of SF254, SF255, SF330, and Custom proposals, thereby minimizing preparation time and improving communication among the proposals team:

- Since all your offices are linked to the Costpoint CRM Info Center, the proposal team can quickly locate and retrieve employee and consultant resumes, contract experience, graphics, firm profiles and narrative text without additional input from employees.
- By centralizing and cataloging your firm's proposals and merge templates, Costpoint CRM makes it easy to retrieve and re-use them.
- Using query features, you can quickly locate the appropriate employees and contracts for the new opportunity.
- Costpoint CRM Custom Proposals comes installed with sample merge templates. Costpoint CRM SF254, SF255, and SF330 Proposals each come installed with a default merge template set. You can use the sample merge templates as is, or modify them to create new merge-templates with specific formats and layout.

This chapter provides an introduction to template creation. If you need assistance in creating or modifying merge templates, Deltek recommends contacting PSA Consulting to schedule a WebEx session or other consulting service.

Activating the Proposals Module

Before setting up Proposals configuration, ensure that your company has a Costpoint CRM license the Custom Proposals and/or the 255, 254, 330 Proposals module(s), and that the license has been activated. See “Log on to Costpoint CRM for the First Time and Activate Modules” on page 7.

Proposals and Security

Access to Proposals is determined through Security. Security also determines whether users have direct access to custom merge templates via **Configuration**, **General**, **Merge Templates**. All Proposal users have access to Proposals 254 and 255 merge templates, regardless of their security role.

If users do not have direct access to Custom Proposals merge templates via **Configuration**, **General**, **Merge Templates**, the system administrator uploads Custom Proposals merge templates to the database in **Configuration**, **General**, **Merge Templates**, and enables users' access to Custom Proposals merge templates on the Merge Templates tab of **Configuration**, **Security**, **Roles**.

Merge Templates

If users do not have direct access to upload new merge templates, the system administrator uploads Custom Proposals merge templates to the database in **Configuration**, **General**, **Merge Templates.** See “Click Save.” on page 92.

Set Up Proposal Firms

If your company uses Costpoint CRM's Team feature, you configure your company's teams as part of Costpoint CRM setup and configuration. Costpoint CRM's Team tool uses a "business unit" model of your company. Using **Configuration**, **Team**, **Codes**, you set up a Team for each of your company's business units, which may be different office locations, work specialties, geographic zones, or some other organizing structure.

The 254 and 255 Proposals module uses the federal government's "office location" model of companies, and calls each office location a "Proposal Firm."

Whether or not your company uses Costpoint CRM's Teams feature, and whether or not, if used, those teams correspond to your company's office locations, you must set up a proposal firm for each office location whose personnel and other data you plan to use in proposals. You set up proposal firms in Configuration, Team, Firm Setup - Proposals.

If your company does use Costpoint CRM's Teams feature, your company data is maintained by team. For the 254, 255, 330 Proposals modules to retrieve this team data for 254, 255, and 330 proposals, each team whose data will be used in 254, 255, 330 Proposals must be added to the proposal firm's Associated Teams tab in **Configuration, Team, Firm Setup - Proposals**.

If your company has not installed the 254, 255 Proposals module, the Additional Info tab of Firm Setup - Proposals omits the Service Fees grid. If your company has not installed the SF330 Proposals module, the SF330 tab does not appear.

The Custom Proposal module retrieves your company's data by team. You do not need to set up proposal firms in **Configuration**, **Team**, **Firm Setup**. However, if your custom proposal uses any merge codes requiring company-wide data (for example, your company's name and address may not be in any individual team record), you must set up a proposal firm and enter the company-wide data there.

To set up the firm name and address:

The General tab allows you to enter basic information about an office location for your firm.

1. Click **Configuration, Team, Firm Setup** from the Costpoint CRM main menu. Costpoint CRM displays the Firms form.
2. Select the General tab.
3. Perform one of the following:
   - To add a new record from scratch, click **New**, **New Firm**.
   - To add a new record based on an existing firm, click **New**, **Select Firm to Copy**. Search for and select the record from Firm Lookup.
   - To add a new record based on the currently displayed record, click **New**, **Copy Current Firm**.

4. Complete the fields on this tab, as follows.

Field	Description
Name	Enter your team's name, or the name of the firm at this location.
Office Location	Enter the firm's office location. This information appears in the Firm lookup. Depending on your firm's practice, you might enter the city or an internal code used for designating each branch office.
Parent	Select this option if this firm is a parent company.
Address1/ Address2/City/ State/Zip/Country	Enter the address of the firm at this location in these fields.
Phone	Enter the telephone number of the firm at this location.
Fax	Enter the Fax number of the firm at this location.

5. Click **Save**.

Set Up Office Locations as Used in Proposals

The Additional Info tab allows you to enter and maintain data for each of your firm's office locations.

To set up office locations:

1. Click **Configuration, Team, Firm Setup** from the Costpoint CRM main menu. Costpoint CRM displays the Firms form.
2. Select the Additional Info tab.
3. Complete the fields on this tab, as described below:

Field	Description
Date Established	Select the date when this office was established.
Ownership Type	Enter ownership type information to indicate what type of company it is. For example, Corporate, Publicly Held, Privately Held, and so on.
Total Personnel	Include the total number of personnel for this location.
Linked Employees	This display-only field contains the number of employees in the Employees Info Center whose Team is listed on the Associated Teams tab of the current Firm record.
Small Business	Select this option if your firm is eligible for Small Business status.
Small Disadvantaged	Select this option if your firm is eligible for Small Disadvantaged status.
Woman Owned	Select this option if your firm is eligible for Woman Owned status.
Interested in Foreign Work	Select this option if your firm is eligible for Interested in Foreign Work status.
Parent Firm	Use this field to link the current firm record to parent firm information. Use Firm Lookup to search for and select a firm. Costpoint CRM creates a link between the record you select here and the corresponding firm record. You can then click on the name in this field to open the firm record.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Former Parent Firms</td><td>Use this grid to maintain a list of the firm's former parent firms.

To insert a firm on this grid:
1. Click Insert. Costpoint CRM inserts a blank row on the grid.
Enter the following file information:
Name
Date Established
Date Name Changed
Duns Number
2. Click Save to save your entries.

To delete a firm from this grid:
1. Click on the row containing the firm you want to delete.
2. Click Delete. Costpoint CRM deletes the selected firm from the grid.

Deleting a firm from the Former Parent Firms grid does not delete the firm from the Costpoint CRM database. To delete a firm from the database, click Delete Firm in the toolbar. You cannot undo this action.</td></tr>
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Deleting a firm from the Former Parent Firms grid does not delete the firm from the Costpoint CRM database. To delete a firm from the database, click Delete Firm in the toolbar. You cannot undo this action.</td></tr>
<tr><td>Service Fees</td><td>Use this grid to enter the firm's professional services fees received each year for the past five years.

If this information is for use in Section 9 of an SF254 Proposal, fees should be entered each year for:
• Work performed directly for the Federal Government (not including grant and loan projects) or as a sub to other professionals.
• All other domestic work, US and possessions, including Federally assisted projects.
• All other foreign work.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Service Fees</td><td>Section 9 contains an option to list fees received by the firm in the last 5 years by category, indexed by the range of the amount. Index and range information is listed in the same section to the right of service fees.

To insert a service fee on this grid:
1. Click Insert. Costpoint CRM inserts a blank row on the grid.
2. Enter the following information:

Year. In the format: yyyy.

Category. Select the appropriate fee category for each item.

Fee Index. Select the appropriate fee index for each line item. The fee index defines the range of the dollar amount of the fee.
3. Click Save.

To delete a service fee from this grid:
1. Click on the row containing the fee you want to delete.
2. Click Delete. Costpoint CRM deletes the selected fee from the grid.

These fields are not used in the SF330.</td></tr>
</table>

4. Click **Save**.

Set Up Associated Team Records

The Associated Teams tab allows you to enter and maintain links to Team records from a firm, if your firm uses teams.

A firm may have many associated teams, but each team may only be related to one firm. When you insert a team on the Associated Team grid, Costpoint CRM checks to ensure the selected team is not affiliated with any other firm. If it is, Costpoint CRM will alert you of this problem and you will be prompted to select a different team.

A Team record must already exist in the Costpoint CRM database before you can enter it on the Associated Teams tab. You must fill out the Associated Teams tab beforehand in order to create a proposal using Costpoint CRM's 254, 255, 330 Proposals.

To set up associated team records:

1. Click **Configuration, Team, Firm Setup** from the Costpoint CRM main menu. Costpoint CRM displays the Firms form.
2. Select the Associated Teams tab.
3. Perform one of the following:
   - To add a new team, click **Insert**. Costpoint CRM displays the Team Lookup. Search for and select a team.
   - To delete a team, select the team, and click **Delete**. Costpoint CRM deletes the selected team from the Teams grid. Deleting a team from a Teams grid does not delete it from the Costpoint CRM database. To delete a team from the database, use **Delete Firm** on the toolbar.
4. Click **Save**.

Set Up SF330 Proposals

Before you can start creating an SF330 proposal, you must review the entries in four code tables and configure your proposal firms. This section shows you how to set up:

- Employee skills/disciplines
- Contract (profile) codes
- Employee roles
- Vendor/Partner
- Firm locations in Firm Setup - Proposals

Set Up Employee Skill/Discipline Codes

Since companies may have more disciplines than the standard set provided by the General Service Administration, before setting up your office locations in **Firm Setup – Proposals**, you may want to first modify the Discipline list by modifying the Employee Skill/Discipline Code table.

> Before adding disciplines to the code table, be aware of the filing requirements for the SF330. The instructions for adding additional disciplines are as follows:
>
> “9. Employees by Discipline. Use the relevant disciplines and associated function codes shown at the end of these instructions and list in the same numerical order. After the listed disciplines, write in any additional disciplines and leave the function code blank. List no more than 20 disciplines. Group remaining employees under “Other Employees” in column b. Each person can be counted only once according to his/her primary function.”

If you do not see Configuration, General, Code Tables in your Navigation Menu, you have not been given access rights to that menu item. See your system administrator.

To add disciplines:

1. Click **Configuration**, **General**, **Code Tables** from the Costpoint CRM Main Menu. Costpoint CRM displays the Code Table Maintenance form.
2. Select the Employee Skill/Discipline table. Costpoint CRM displays the Employee Skill/Discipline dialog.

   The code table entries should appear in the standard order of the GSA discipline's list. Each code table entry has a code, SF330 code, and a description.

   To see whether a code already exists in the code table, click on the Description column heading. The code table will alphabetically sort itself by that column.

To quickly scan for the next available code, click on the Code column heading. The codes will re-order by code. Scroll to the bottom of the list for the next available code.

3. To add a new code, click **Insert.**
4. Enter the code number and description, leaving the **SF330 Code** field blank.
5. Click **Save**.

Contract (Profile) Codes Code Table

Some firms may want to use profile codes that are not in the standard set provided by the General Service Administration. Therefore, before selecting Profile Codes on the Firm Setup - Proposals, SF330 tab, you may have to first modify the Contract Codes Code table.

Before adding profile codes to the code table, be aware of the filing requirements for the SF330. The instructions for adding additional profile codes are as follows:

“10. Profile of Firm's Experience and Annual Average Revenue for Last 5 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the experience categories which most accurately reflect the firm's technical capabilities and project experience. Use the relevant experience categories and associated profile codes shown at the end of these instructions, and list in the same numerical order. After the listed experience categories, write in any unlisted relevant project experience categories and leave the profile codes blank. For each type of experience, enter the appropriate revenue index number to reflect the professional services revenues received annually (averaged over the last 5 years) by the firm or branch office for performing that type of work. A particular project may be identified with one experience category or it may be broken into components, as best reflects the capabilities and types of work performed by the firm. However, do not double count the revenues received on a particular project.”

To add profile codes:

1. From the Code Table Maintenance form, select the Contract Codes table. Costpoint CRM displays the Contract Codes dialog.

   If you need to check if a code already exists in the code table, you can click on the Description column heading. The code table will alphabetically sort itself by that column.

   To quickly scan for the next available code, click on the Code column heading. The codes will alphabetically re-order by code. Scroll to the bottom of the list for the next available code.
2. To add a new code, click **Insert.**
3. Enter the code number and description, leaving the **SF330 Code** field blank.

4. Click **Save**.

Employee Role Code Table

The Employee Role Code table plays a very important part in the creation of the SF330. In order for the Section G. Personnel Matrix to be auto-populated correctly by Sections E and F, the employee's role on a contract must be defined on the Team Tab in Contract Info Center.

The default install of Deltek Costpoint CRM comes with three values in the Employee Role Code Table: BD Manager, Capture Manager, and Technical Director.

To add employee contract roles:

1. From the Code Table Maintenance form, select the Employee Role table. Costpoint CRM displays the Employee Role dialog.

   If you need to check if a code already exists in the code table, you can click on the Description column heading. The code table will alphabetically sort itself by that column.

   To quickly scan for the next available code, click on the Code column heading. The codes will alphabetically re-order by code. Scroll to the bottom of the list for the next available code.
2. To add a new code, click **Insert.**
3. Enter the code number and description.
4. Click **Save**.

Vendor/Partner Role Code Table

The Vendor/Partner Role Code table plays a very important part in the creation of the SF330. In order for Block 25 of Section F to be auto-populated correctly, the vendor/partner's role on a contract must be defined on the Team Tab, Vendor/Partners grid in Contract Info Center.

To add vendor/partner contract roles:

1. From the Code Table Maintenance form, select the Vendor/Partner Role table. Costpoint CRM displays the Vendor/Partner Role dialog.
2. Click **Insert** to add a new line.
3. Enter a code and a description for the new Vendor/Partner Role.
4. Click **Save**.

Firm Setup - Proposals

Firm Setup is designed to store information about your firm, its branch offices, joint ventures, and other affiliated relationships. This information is useful because it will be used in creating SF330 Proposals.

Before creating SF330 Proposals, you will need to configure your Firm Setup for Proposals. When the firm's setup has been established, you can begin to create the SF330.

The Firm Setup - Proposals form lets you create and maintain records for each of your organization's office locations, as used in 330 proposals.

Firm Setup - Proposals: General Tab

Use the General tab to enter the name and address for the firm. See “Set Up Proposal Firms” on page 135 for information.

Firm Setup - Proposals: Additional Information Tab

Use the Additional Info tab to store statistical information relating to the firm’s history. See “Set Up Office Locations as Used in Proposals” on page 137 for information.

Firm Setup - Proposals: Associated Teams Tab

Use the Organization grid on the Associated Teams to enter and maintain links to Team records for a company. See “Set Up Associated Team Records” on page 141 for information.

Firm Setup - Proposals: SF330 Tab

Use the SF330 tab to enter and maintain additional information needed for the SF330 form.

To enter additional SF330 information:

1. Click **Configuration**, **Teams**, **Firm Setup - Proposals** from the Costpoint CRM Main Menu. Costpoint CRM displays the Firm Setup - Proposals form.
2. Select the SF330 tab.
3. Complete the fields on this tab, as follows:

Field	Description
Annual Average Revenue - Last 3 Years	
Federal Work	Select the appropriate revenue index. This field populates Part II, Block 11a.

Field	Description
Non-Federal Work	Select the appropriate revenue index. This field populates Part II, Block 11b.
Total Work	Select the appropriate revenue index. This field populates Part II, Block 11c.
DUNS Number	Enter your firm's Data Universal Numbering System (DUNS) number. This field populates Part II, Block 4.
Disciplines	Select the firm's disciplines for Part II of the SF330. To do this, click **Insert** and select the discipline(s) from the list of Employee Skills/ Disciplines. You can select up to 20 disciplines. These fields populate Part II, Blocks 9a and 9b.
Contract Codes	Select the firm's codes for Part II of the SF330. To do this, click **Insert** and select the contract code(s) from the list of Contract Codes. You can select up to 22 contract codes. These fields populate Part II, Block 10a, 10b, and 10c.

4. Click **Save**.

6 Set Up Teams

In this chapter

- ❖ Overview
- ❖ Team Configuration Checklist
- ❖ Set Up Team Levels
- ❖ Set Up General Team Options
- ❖ Set Up Subcodes and Team Codes
- ❖ Set Up Costpoint CRM Proposals Firm Options

Overview

The Teams portion of Costpoint CRM Configuration enables you to create individual "teams" within your firm. For example, if your firm is divided into regions and offices, you may create a separate team for each region and office, and maintain information for each of these discrete segments of your firm's business.

You can give each level a reference name of your choice. (The defaults are Team Level 1, Team Level 2, and so on.) In a one-level structure, you could label the level "Office." In a three-level structure, you might choose the following labels:

Level	**Label**
1	Region
2	Office
3	Department

During Team setup, you establish teams and associate them with contracts and employees. You create team subcodes and combine the subcodes to identify your teams. Individual teams can consist of up to five subcodes, each representing a different level of information. Examples of labels you might supply include company, region, branch, discipline, and principle.

By default, Costpoint CRM calls your entities teams wherever they appear on screens or reports. During installation, you can decide to give them a different name: for example, organization, business unit, or any other name that you choose. See "Mobile Application Suite Settings" on page 48 for more information.

For more information about Team concepts, see the Concepts book in the Costpoint CRM Help system.

Team Configuration Checklist

The following checklist describes the steps to follow to set up the teams in your firm. Each step is described in this chapter.

Step		
1.	Set up team levels.	
2.	Set up general team options for your levels.	
3.	Enter team subcodes.	
4.	Create new firms and establish relationships between teams and firms.	

Set Up Team Levels

Before you define general team options, you need to determine the number of team levels you want for your firm.

To set up team levels:

1. Back up your database.
2. Click **Utilities**, **Key Formats**, **Teams** from the Costpoint CRM main menu. Costpoint CRM displays the Key Convert Team Format form.
3. Complete the fields on this form, as described below:

Field	Description
Team Levels	Displays the number of team levels, up to 5 levels. This number reflects the number of levels you have added in the **Label** field.
Team Delimiter	Enter the desired delimiter for your team level. The current delimiter for your team number appears for reference. A delimiter must be a special character, not 0 to 9, A to Z, or |. Examples of delimiters you can use are @ (at sign), # (pound sign), $ (dollar sign), ^ (carat sign), and ; (semicolon). Delimiters are counted as part of the team level length. For example, if the total length is 6, the team delimiter is a period (.), and the team delimiter position is 4, the team number appears as 456.78.
Label	Click **Insert** to add a new level, up to 5 levels. Use the **Up** and **Down** arrow keys to determine the order of the levels (the first one is level 1, the second one is level 2, and so on). You do not determine the label of the level here. This is done in the next procedure, Set Up General Team Options.
Length	Enter the length of the team code label. The total length of all levels, including delimiters, cannot exceed 14.

Field	Description
Add/Remove from Left/Right	If you want to add or remove characters from a number/code, you can use this feature to determine whether the characters are added to or removed from the left or right side of the number. For example, if you increase the total team length from 5 to 7, you can then use this feature to add those two numbers to the left of the number: 12345 becomes 0012345. Conversely, if you decrease the total team length from 7 to 5, you can then use this feature to remove those two numbers to the right of the number: 1234567 becomes 12345. Remember that the delimiter is counted as part of the total team length.
Sample Value	Displays the format of the team number that you entered in the format fields.

4. Click **Run**.

Set Up General Team Options

To begin Team Setup, you need to specify your firm's overall team options.

To set general team options:

1. Click **Configuration, Team, General** from the Costpoint CRM main menu. Costpoint CRM displays the Team General Setup form.

2. Complete the fields on this form, as described below:

Field	Description
Number of Levels	This field displays the number of levels for the team that you set in the Team Key Formats utility.
Delimeter	This field displays the delimiter used with the team that you set in the Team Key Formats utility.
Length	This field displays the length for the level that you set in the Team Key Formats utility.
Singular Label	Required. For each level, enter the singular descriptive label for this level, using up to 16 characters of free text, for example **Office**.
Plural Label	Required. For each level, enter the plural descriptive label for this level, using up to 16 characters of free text, for example **Offices**.
Level (1-5)	The Team levels are set up in the Key Formats utility. There can be a maximum of five levels. You can give each level a reference name of your choice. (The defaults are Team Level 1, Team Level 2, and so on.) For example, in a one-level structure, you can label the level "Office." In a three-level structure, you might choose the following labels: **Level** **Label** 1 Region 2 Office 3 Department In addition to the general term "team," Costpoint CRM uses labels to describe the categories of subcodes. Examples of labels you might supply include "company," "region," "branch," "discipline," and "principle." Each label can have a maximum of 16 alphanumeric characters. You can change the labels at any time.

Field	Description
Display Costpoint Team Code	Select this option if you want to display Costpoint team codes in Costpoint CRM Team lookups.
Enable Multicompany	Select this option to enable the Costpoint CRM Multicompany module.

3. Click **Test Setup** to have Costpoint CRM perform tests on your data to guard against invalid data. In the case of invalid data, Costpoint CRM will promptly display a notification message.

   Make appropriate changes to the problematic data, and re-test.

4. Click **Save**.

Set Up Subcodes and Team Codes

After configuring Team General Setup, it is necessary to set up the individual subcodes for each level of your team, and then combine those subcodes to create your team codes. The subcode structure determines how Costpoint CRM tracks contract and employee data, and how you can access and organize this information on various Costpoint CRM reports.

These subcodes may contain letters or numbers, and can be multiple characters. In fact, if your firm has a two- or three-level structure, you must combine subcodes from different levels to create valid teams.

Examples of Subcodes

Following are examples of two-character subcodes:

Office Locations Subcode	Description	Disciplines Subcode	Description
BO	Boston	OO	Unassigned
CO	Corporate	AR	Architectural
SF	San Francisco	EN	Engineering
EV	Environmental		

Following are examples of combinations of subcodes:

BO:OO	Boston office; unassigned (i.e., no discipline)
BO:AR	Boston office; Architecture discipline
BO:EN	Boston office; Engineering discipline
CO:OO	Corporate office*; unassigned discipline
CO:AR	Corporate office*; Architecture discipline
SF:OO	San Francisco office; unassigned discipline
SF:EV	San Francisco office; Environmental discipline
SF:EN	San Francisco office; Engineering discipline

*Corporate = activity that is not associated with a particular office.

Add Subcodes

To add new subcodes:

1. Click **Configuration**, **Team**, **Codes** from the Costpoint CRM main menu. Costpoint CRM displays the Team Codes form.
2. Select the Subcodes tab.
3. Click the **Insert** button. A blank line displays on the Subcodes grid.
4. Complete the fields on this tab, as described below:

Field	Description
Level	Select the team level for the team's subcode.
Code	Specify a two-digit code to identify this team level.
Label	Enter a descriptive label for this code, using up to 16 characters of free text.
Costpoint Code	This column displays if the **Display CostPoint Organization Code** option is selected on the Organization General Setup form. Refer to this column for the CostPoint code information that corresponds with the current Costpoint CRM code. The CostPoint codes are populated by the CostPoint reorganization function.

5. Click **Save**.

Create Team Codes

To create team codes:

1. Click **Configuration**, **Team**, **Codes** from the Costpoint CRM main menu. Costpoint CRM displays the Team Codes form.
2. Select the Team tab.
3. Click the **Insert** button. A blank line displays on the Team grid.
4. Complete the fields on this tab, as described below:

Field	Description
Offices	Select the office location for the team. Options in this drop-down are based on subcode entries on the Subcodes tab.
Disciplines	Select the discipline for the team code.
Name	Enter the name of the team.

5. Click **Save**.

Set Up Costpoint CRM Proposals Firm Options

Firm Setup stores information about your firm, its branch offices, joint ventures, and other affiliated relationships. These procedures apply to Custom Proposal users only.

You can set up the firm information to reflect the way in which you want to organize your employees, contracts, and opportunities. For example, if your firm is divided into regions, your system administrator might change the name of this function to "Regions" and change the field labels on all corresponding screens to reflect the regional nomenclature.

Add New Firm Records

The General tab allows you to enter basic information about an office location for your firm. After entering this information, use the Additional Info tab or the Associated Orgs tab to enter more details.

To add a new firm record:

1. Select **Configuration**, **Team**, **Firm Setup - Proposals** from the Costpoint CRM main menu. Costpoint CRM opens the Firms form.
2. Select the General tab.
3. Perform one of the following:
   - To open a blank firm record, click **New** and select **New Firm**.
   - If the new firm is based on an existing firm, click **New** and select the **Select Firm to Copy** option.
4. Complete the fields on this tab, as described below:

Field	Description
Name	Enter your firm's name, or the name of the firm at this location.
Office Location	Enter the firm's office location. This information appears in the **Firm Lookup**. Depending on your firm's needs, you might enter the city or an internal code used for designating each branch office.
Parent	Select this option if the firm is a parent company.
Address 1	Enter the first line of the firm's address at this location.
Address 2	Enter the second line of the firm's address at this location.
City	Enter the city in the firm's address at this location.
State	Enter the state in the firm's address at this location.

Field	Description
ZIP	Enter the zip code in the firm's address at this location.
Country	Enter the country in the firm's address at this location.
Phone	Enter the telephone number of the firm at this location.
Fax	Enter the facsimile transmission telephone number of the firm at this location.

5. Click **Save**.

Set Up Data for Office Locations

The Additional Info tab allows you to enter and maintain data for each of your firm's office locations.

To enter data for your firm's office locations:

1. Select **Configuration**, **Team**, **Firm Setup** from the Costpoint CRM main menu. Costpoint CRM opens the Firms form.
2. Select the Additional Info tab.
3. Complete the fields on this tab, as described below:

Field	Description
Date Established	Click the pop-up calendar and select the date when this office was established.
Ownership Type	Enter ownership type information to indicate what type of company it is. For example, Corporate, Publicly Held, Privately Held, and so on.
Total Personnel	Include the total number of personnel only for this location.
Linked Employees	This display-only field contains the number of employees in the Employee Info Center whose Team is listed on the Associated Teams tab of the current Firm record.
Minority Status	
Small Business	Select this option if your firm is eligible for Small Business status.
Small Disadvantaged	Select this option if your firm is eligible for Small Disadvantaged status.
Woman Owned	Select this option if your firm is eligible for Woman Owned status.
Interested in Foreign Work	Select this option if your firm is eligible for Interested in Foreign Work status.
Parent Firm	Use this field to link the current firm record to parent firm information. You can open the Firm Lookup either by using the **Find** field on this form, or by clicking  in this field. Costpoint CRM creates a link between the record you select here and the corresponding firm record. You can then click on the name in this field to open the firm record.

Field	Description
Former Parent Firms	Use this grid to maintain a list of the firm's former parent firms. You may insert or delete firms on this grid as needed.

4. Click **Save**.

Set Up Links to Records

The Associated Teams tab allows you to enter and maintain links to Team records from a firm.

A firm may have many associated teams, but each team may only be related to one firm. When you insert a team on the Associated Teams grid, Costpoint CRM checks to ensure the selected team is not affiliated with any other firm. If it is, Costpoint CRM will alert you of this problem and you will be prompted to select a different team.

A team record must already exist in the Costpoint CRM database before you can enter it on the Associated Teams tab.

To set up links to team records:

1. Select **Configuration**, **Team**, **Firm Setup** from the Costpoint CRM main menu. Costpoint CRM opens the Firms form.
2. Select the Associated Teams tab.
3. Complete the fields on this tab, as described below:

Field	Description
Team	This field displays the team code. To enter a new Team, click **Insert**.
Team Name	This field displays the team name.

4. Click **Save**.

7 Set Up Desktop and Microsoft Office Integration

In this chapter

Costpoint CRM Desktop and Microsoft Office Integration

The Integration utility allows you to integrate Costpoint CRM information with Microsoft Word and Microsoft Outlook. This includes sharing customer, contact, and activity information, as well as searching the Costpoint CRM Document Info Center for data to include in your Word documents. In addition, you can automatically generate Costpoint CRM customers, contacts, and activities, and even search the database directly from your desktop.

Before using this feature, you need to first download the Integration files and configure the Integration tools. Both of these procedures are described in this chapter.

Download Desktop and Microsoft Office Integration

The Download Microsoft Integration utility allows you to download the software files necessary for Microsoft Office and Microsoft Outlook integration.

System Requirements

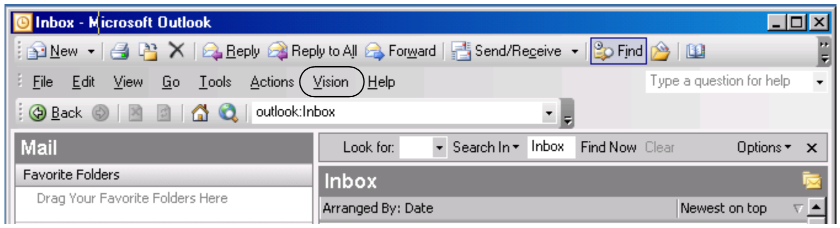
- Microsoft .NET Framework 2.0
- Microsoft Office XP (SP3) or Office 2003 (SP1)

To download Microsoft Integration:

1. Close all Microsoft Office applications before installing.
2. Click **Utilities**, **Download Integration** from the Costpoint CRM main menu. Costpoint CRM displays the Download Integration form.
3. Click **Download (and auto-configure) Microsoft Office and Desktop Integration**. Costpoint CRM downloads the program.

   If Costpoint CRM does not allow you download Integration using this option (your Internet security level may be set too high), click on the second option, **Download Desktop and Microsoft Office Integration**. Then, follow the instructions in the Microsoft Office Integration Installation Wizard.

   When you have completed the download, a CostpointCRM/CostpointCRM menu option appears on the Microsoft Outlook title bar, as shown below. This is where you configure the Integration tools, as described in the next section.



Costpoint CRM/ Costpoint CRM menu

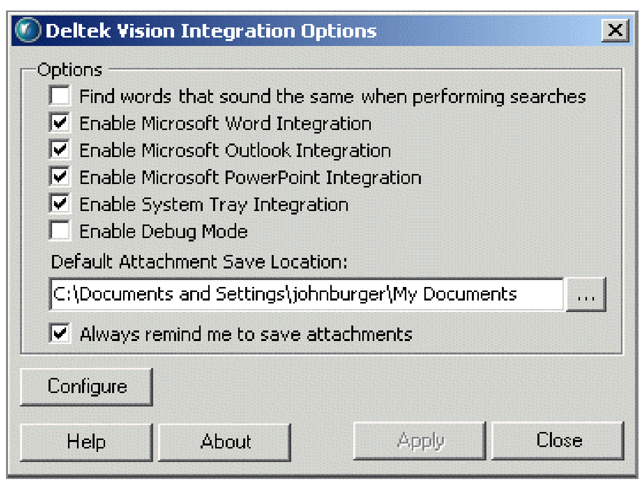
Note that a CostpointCRM/CostpointCRM menu also appears in the Microsoft Word title bar. Each of these drop-down menus contains the **Options** selections needed to configure the Integration features. Regardless of where you configure these options, they apply to the whole application.

4. Configure the Integration Tools. See the next section for details and instructions.

Configure the Integration Tools

Use the Integration Options dialog to configure the settings for the Desktop and Microsoft Office Integration application.

1. From Microsoft Outlook (or Microsoft Word), click the CostpointCRM/Costpoint CRM menu option and select **Options** from the drop-down menu. Costpoint CRM displays the Integration Options form.

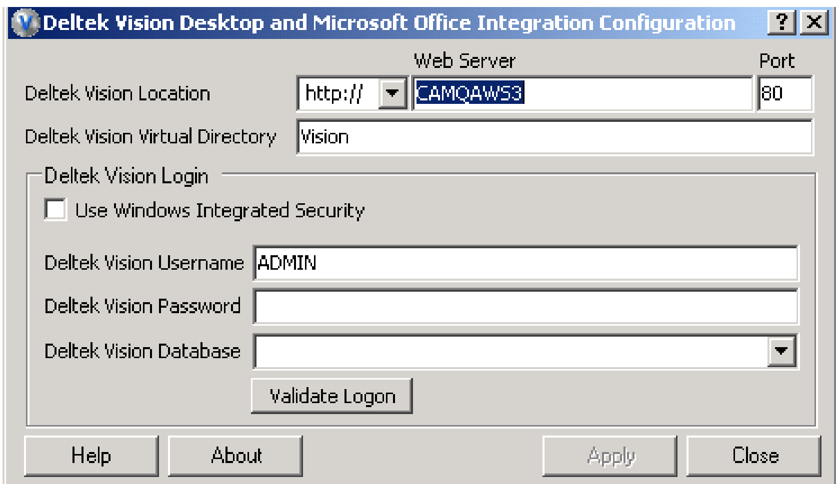


2. Select from the following options:

   - **Find words that sound the same when performing searches**. Select this option if you want the ability for Costpoint CRM to search for words that sound like the search text.
   - **Enable Microsoft Word Integration**. Select this option to enable the Word Integration feature.
   - **Enable Microsoft Outlook Integration**. Select this option to enable the Outlook Integration feature.

- **Enable Microsoft PowerPoint Integration**. Select this option to enable the PowerPoint Integration feature.
- **Enable System Tray Integration**. SElect this option to enable the System Tray Integration feature. When you select this option, Costpoint CRM places an icon in your system tray for quick access to the integration features.
- **Enable Debug Mode**. This field is used by Deltek support to troubleshoot system problems. This displays a number of message boxes during usage to help support troubleshoot. Only select this option in conjunction with Deltek support.
- **Default Attachment Save Location**. Enter the directory, such as C:\, where you want Costpoint CRM to save default attachments. This field is recommended.
- **Always remind me to save attachments**. Select this option if you want Costpoint CRM to prompt you to save your attachments.

3. Click **Configure**. Costpoint CRM displays the Desktop and Microsoft Office Integration Configuration dialog.



4. Complete the fields on this form.

- **Deltek CostpointCRM/CostpointCRM Location**. Enter your Costpoint CRM location.
- **Deltek CostpointCRM/CostpointCRM Virtual Directory**. Enter your Costpoint CRM directory.
- **Use Windows Integrated Security**. Select this option is you want to use Windows Integrated Security. Costpoint CRM determines which logon mode you use to connect with Costpoint CRM.
- **Deltek CostpointCRM/CostpointCRM Username**. If you did not select the User Windows Integrated Security option, enter the username assigned by the system administrator.
- **Deltek CostpointCRM/CostpointCRM Password**. If you did not select the User Windows Integrated Security option enter the password assigned by the system administrator.

- **Deltek CostpointCRM/CostpointCRM Database**. Select the database you want to access.

5. Click **Validate Logon** to ensure that a successful connection can be made to the Costpoint CRM database before using the functionality of the add-in.
6. Click **Close** to save your changes and close the Configuration dialog.

You are now ready to start using the Microsoft Word and Microsoft Outlook Integration tools with Costpoint CRM.

For complete information about Costpoint CRM Desktop and Microsoft Office Integration, see the Data Synchronization and Microsoft Integration book in the Costpoint CRM Help system.

8 Set Up Security for Users

In this chapter

Overview

After you have finished configuring Costpoint CRM for your firm, Costpoint CRM's security features enable the Costpoint CRM system administrator to grant or restrict a user's access to modules and forms within Costpoint CRM. In order to define each user's rights to Costpoint CRM, the system administrator first creates user “roles” that reflect your team's business rules. For example, a “marketing” role may enable a user to only view those portions of Costpoint CRM that relate to marketing.

After you create roles, you can assign each user or a group of users to a role. Because every user must have a role, this “role-based” security system provides tremendous flexibility and ensures users have access to the specific information they need, down to the record level. Record level security further defines a user's security rights by assigning access to specific rows of data based on certain criteria.

Costpoint CRM verifies users when they log onto Costpoint CRM with their username and password, as assigned by the system administrator. The user may not change their username, but may change their password after the initial log on.

Upon log on, Costpoint CRM identifies the user as having a specific role. Because of this role, Costpoint CRM only lets the user perform actions where his or her security role has appropriate access.

Notes About Security

- The security administrator must set up security for all users in your firm.
- Before assigning rights to any Costpoint CRM module, the module's activation rights must be assigned in Configuration, Module Activation. See “Log on to Costpoint CRM for the First Time and Activate Modules” on page 7.
- Before using Costpoint CRM, it is important to establish user guidelines that are based on your team’s business rules (for example, who has access to what). This information should be discussed during the planning phase for Costpoint CRM.

Example of Security Setup

The following is an example of how a firm could use Costpoint CRM Security to quickly set up 300 users.

Scenario

A 300-person firm is using Deltek Costpoint CRM. These 300 employees are divided into the following departments, each of which performs different job functions and has separate needs for information from Costpoint CRM:

- 200 customer service representatives
- 50 marketing communications personnel
- 25 product managers
- 25 account representatives

Setup

1. Create a role for each group of users:

   •Go to **Configuration, Security, Roles**. Select **New Role** from the **New** menu.

   •For the first role, enter CustomerService as the role name.

   •Use the Access Rights tab to establish access rights to the role.

2. Assign users to the role and automatically generate passwords:
   - Go to **Configuration, Security, Users and Passwords** and select the **Generate Users** tab.
3. Select “CustomerService” (the name of the role you just created) from the **Role** drop-down list. Select the appropriate options for the **Name Type, Password**, and **Printer** fields.
4. Select the names of the 200 employees who belong in this role and click **Generate**. These employees are now associated with the CustomerService role, and their Name Type, Password, and Printer information is automatically generated.
5. Repeat these steps for each of the three other roles: marketing communications, product managers, and account representatives.

Security Configuration Checklist

The following checklist describes the steps to follow to set up Security for your firm. Each step is described in this chapter.

Step		
1.	Create roles.	
2.	Establish access rights for roles.	
3.	Establish a role's access rights to other Costpoint CRM functions.	
4.	Create users and establish system-wide password policies.	
5.	Add user to roles.	
6.	Enable/disable user logons.	
7.	If desired, configure Windows Integrated Security.	

Create Roles

Roles are an integral part of Costpoint CRM security because they determine a user's access rights to the different parts of Costpoint CRM. For this reason, each user must have one, and only one, assigned role.

When you create a role in Costpoint CRM, you can select various levels of access for the role. If users have been created, you can assign users to the role. This is helpful for establishing roles for each business unit within your team. If users have not been created, though, you can create a role, create users, and then assign users to the role.

Types of Roles

When you create roles, you must specify the type of role (which you do on the General tab of Security/Roles). See the procedure Create New Roles below. There are three types of roles, Administrator, Accounting, and CRM, which are described below.

Administrator

Select the **Administrator** option to give the role administrative privileges to Costpoint CRM. When you select this option, Costpoint CRM activates the ability to set up and save Costpoint CRM global searches and report favorites.

Non-Administrator

Leave the **Administrator** option unselected if you do not want the role to have administrative access to Costpoint CRM.

Using Costpoint CRM’s Default Role

Costpoint CRM includes a standard, pre-defined default role that is part of the application. This role is for the system administrator and has access to all Costpoint CRM features and functions. To use the default role for a new user, select the Default role option when you create the user.

You may also delete the default role, if desired; the default role is only for initial startup.

Create New Roles

New roles may be created from scratch, giving you the flexibility to create unique roles based on your team's specific requirements. After you create a new role, you may use the Role Tabs to establish access rights for the role.

To create a new role:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the General tab.

   Use the General tab of Role Security to enter a role's profile information, including the name and type of role, and Costpoint CRM module options. Costpoint CRM includes the ability to select specific types of user functions for each roleDepending on the options selected on this screen, different Role tabs will display. Use the Role tabs to establish specific access rights for each role. Access rights determine a role's admittance to the modules, tabs, menus, dashparts, and reports that are available within Costpoint CRM.
3. Select **New Role** from the **New** menu to open a blank role record.
4. Complete the fields on this tab, as follows:

Field	Description
Role	Enter the name of the new role.
Type of Role	You **must** select one or more of the following options to determine the type of Costpoint CRM role. The type defines the role's rights and access to relevant information. Type options include: • **Administrator**
Full access to all menu items	Select the Full access to all menu items option to assign FULL access rights to all menu items automatically. Costpoint CRM selects every option on this form. For planning purposes, it is important to note that selecting this option means that all menus added in future versions of Costpoint CRM will be available automatically. To keep this from happening automatically, manually select all boxes in the tree instead of using the Full access to all menu items option. Note that this list of menu items reflects the Costpoint CRM navigation tree; therefore, if you customize your navigation tree, this list will reflect those changes.

Field	Description
Favorites Organizing	This field works in conjunction with Costpoint CRM Reporting to save reporting options that impact the role's ability to save or delete searches, favorites, and reports. Select one of the following: • **Save Personal Only**. Saves searches, favorites, and sets of report options for personal use only. You may not share them with other Costpoint CRM users. Also, you cannot create, rename, or delete folders within any of the Global folders (for favorites, options, or searches).
	• **Save For My Role**. Saves searches, favorites, and sets of report options for yourself and all members who share your security role. • **Save For All Roles**. Saves searches, favorites, and sets of report options for yourself, all members who share your security role, and for global access by any co-worker using Costpoint CRM.
Process Queues: Allow priority x (or higher)	This is the priority a role should have access to for scheduling reports and postings. For example, if you set this to "2" for a given role, then users in that role only have permission to schedule jobs in queues marked as priority 2, 3, 4, etc. In this case, the users in that role cannot submit jobs to priority 1 queues. Note that a process queue of "0" gives the role access to schedule all reports and postings to all queues.
Team Record Access	Use the **Team Record Access** option to select the teams the role can access in both the Team Lookup.

Field	Description
Lookup Options	Use the Lookup Options to determine the search options that display within the Costpoint CRM search functions. • Select the Allow Access to SQL Where field to include the SQL Where Clause in the Display Type drop-down. The default for this option is not selected. • Select the Enable Searching Across Info Centers option to enable an additional LookupSearch Types and Fields column on the Advanced Search dialog. Use these fields todictate the search criteria for searching across multiple info center records. See Search Across Info Centers for more information.
Email Template Organizing	Use the Email Template Organizing option to select the method for saving email templates. Options include: • Use Existing Only— Saves existing email template only. • Save Personal Only— Saves personal email templates only. Costpoint CRM selects this option by default. • Save for My Role— Saves personal email templates or global templates for assigned role only. • Save for All Roles— Saves personal email templates or global templates for any role.

5. Click **Save**.

Copy Existing Roles to Create New Roles

Copying a role enables you to copy a role and its properties, then modify as necessary to create a new role. When you copy a role, the new role automatically inherits the first role's access rights and privileges, including record level security. The new role then needs a unique role name.

To copy a role to create a new role:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Use the **Find** field to search for and select the role you want to copy.
3. Select **Copy Current Role** from the **New** menu to copy the current role. Or, select **Select Role to Copy** to select a different role. If you choose **Select Role to Copy**, you must search for and select the role you want to copy.
4. Click **Copy**. Costpoint CRM copies the selected role.
5. Enter a new name for the role, and then modify the role information, as needed. See “Create New Roles” on page 174 for field information.
6. Click **Save**.

Establish Roles' Access Rights

Use the Record Access tab of Role Security to determine a role's access rights and record level security for various Costpoint CRM applications. This is useful for creating roles that specifically address your team's requirements. If necessary, you may also use this tab to run a Role Summary report. Even if a role does not have access to an Info Center, you may still set up record level read and update criteria for reporting purposes.

Remember that before you can assign rights to any Costpoint CRM module, the module must be activated in Configuration, Module Activation.

To establish access rights:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Record Access tab.
3. Complete the fields on this tab, as follows:

Field	Description
Application	Select the info center or related module for which you are establishing access rights. An arrow indicating the selected item displays next to the name.
Access	Select the access rights for the selected info center. Access right options are as follows: • **Read Only**. Gives the role read-only rights to the Info Center. The role can look at records but not add, modify, or delete record information. • **Modify Only**. Gives the role read and modify rights to the Info Center. The role can look at records and make modifications to information, but cannot add new records or delete records. • **Add/Modify**. Gives the role read, add, and modify rights to the Info Center. The role can look at, modify, and add records, but cannot delete records. • **Full**. Gives the role full rights to the Info Center. This includes the ability to read, add, modify, and delete records.
Record Level View	Click in the **Record Level View** column and use the lookup to select criteria for the chosen info center. The default for this field is **Disabled**. Note that the role's access rights must coincide with the Record Level rights. For example, if a role has "Read Only" rights under Access, you cannot then give Update privileges in the **Record Level** column.

Field	Description
Record Level Update	Click in the **Record Level Update** column and use the look up to select the update access for the record level. The default for this field is **Disabled**. Note that the role's access rights must coincide with the Record Level rights. For example, if a role has "Read Only" rights under Access, you cannot then give Update privileges in the **Record Level** column.
Activity Access	Use these fields to determine the access to Costpoint CRM activities.
Record Level View	Select criteria for the chosen info center. Options include: • **Not in use**. Select this option to eliminate Record Level View from the Activity access rights. This is the default setting. • **Use Info Center access**. Select this option to apply info center access to the activity record access. For example: The Record Access for the Customer Info Center is set to all customers in California. If you set the activity access to **Use info center access**, then of all activities associated with a customer, the role will only be able to view the activities of the customers to which it has rights (in other words, all customers in California). • **Use Query**. Select this option to use a query to determine the activity access rights.

Field	Description
Record Level Update	Select the update access for the record level. Options include: • **Read Only**. Gives the role read-only rights to the activity. The role can look at records but not add, modify, or delete record information. • **Modify Only**. Gives the role read and modify rights to the activity. The role can look at records and make modifications to information, but cannot add new records or delete records. • **Add/Modify**. Gives the role read, add, and modify rights to the activity. The role can look at, modify, and add records, but cannot delete records. • **Full**. Gives the role full rights to the activity. This includes the ability to read, add, modify, and delete records.

More About Record Level View and Record Level Update

Record level security further defines a user's security rights by assigning access to specific rows of data based on certain criteria. You define record level security through the Costpoint CRM lookups. Once you create specific queries that address the role's access to records, the lookup results list will only show records to which the role has access rights. The users that are assigned to that role will only be able to navigate the Costpoint CRM records where they are granted access.

Use the **Record Level View** field to access the lookup that enables you to select criteria for each Costpoint CRM Info Center. You may grant or restrict different levels of access for each individual Info Center. For example, if you set the Read Level for the Opportunities Info Center WHERE Contract Manager (the role) EQUALS John James AND state EQUALS Missouri, then the contract manager named John James will only have read level access to the Opportunity Info Center records for the state of Missouri.

Use the **Record Level Update** field to access the lookup that enables you to select criteria for each Costpoint CRM Info Center. You may grant or restrict different levels of access for each individual Info Center. For example, if you set the Update Level for the Opportunities Info Center WHERE Contract Manager (the role) EQUALS John James AND state EQUALS Missouri, then the contract manager named John James will have update level access to the Opportunity Info Center records for the state of Missouri.

In addition to granting or restricting access to individual records, Record Level Security also supports granting or restricting access to hierarchical record structures. One such hierarchical structure is the Contract (Level 1), Phase (Level 2), and Task (Level 3) structure related to work breakdown. For example, if a role has access rights to a Contract, then that role will also have access to all Phases and Tasks within that Contract. However, if a role only has access to a specific Phase within a Contract, the role can only access Tasks within that particular Phase -- the role cannot access other Phases or Tasks within the same Contract or in other Contracts.

4. Click **Save**.

Establish Access Rights to Other Costpoint CRM Functions

The Access Rights tab of Role Security controls the access right information for several Costpoint CRM functions. Use this tab to select a function, then define and save the access rights information for each Costpoint CRM role.

The functions controlled by the Access Rights tab include:

- Application Tabs
- Merge Templates
- Users
- Lookups
- Reports
- Report Printers
- Favorite Report
- Saved Searches
- Saved Options
- System Dashparts
- Web Dashparts

To establish access rights for each of these functions:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the **Access Rights** tab.
3. Proceed to the desired function on the next several pages for more information.

Notes about functions:

- A global search is a search that is available to all users of one or more Costpoint CRM roles. Only administrators have the security privileges to create global searches for employees assigned to a given Costpoint CRM role.
- To select a range of items in the available and selected columns for these functions, use the **Shift** key. To select random items in the available and selected columns, use the **Ctrl** key.

System Dashboard Function

Use the System Dashparts function of Role Security to establish access rights to the standard portions of the Costpoint CRM Dashboard. The Costpoint CRM Dashboard is the welcome screen that provides each user with quick links to the most frequently accessed parts of Costpoint CRM. For more information about the Costpoint CRM Dashboard, see the Dashboard book in the Costpoint CRM Online Help system.

After a role's dashparts have been established, each user can configure their own dashboard according to what they need and how they use the system. Thus, selecting dashparts for a role only determines what the users assigned to that role can select from, not what they will actually view.

To select the system dashparts a role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **System Dashparts**.
5. Select the appropriate action:

   - To assign full access rights to all dashparts automatically:

     Select the Full access to all tabs option. Costpoint CRM selects every option on this form to enable full access to all tabs. Selecting this option overrides the ability to assign access rights to specific tabs.

     For planning purposes, it is important to note that selecting this option means that all tabs added in future versions of Costpoint CRM will be available automatically. To keep this from happening automatically, manually select all boxes in the tree instead of using the Full access to all tabs option.

   - To assign full access to specific dashparts:

     Select the dashpart(s) that you want the role to be able to access from the Available Dashparts column and click **Add**. Costpoint CRM moves the selected dashparts from the Available Dashparts column to the Dashparts for this Role column. These dashparts are now accessible by this role.

   - To remove accessibility to dashparts:

     From the Dashparts for this Role column, select the dashparts that you want to remove and click **Remove**. Costpoint CRM moves the selected dashparts from the Dashparts for this Role column to the Available Dashparts column. These dashparts are no longer accessible by this role.

6. Click **Save**.

Web Dashparts Function

Use the Web Dashparts function of Role Security to establish access rights for the selected role to Web Dashparts. Web Dashparts are used on the Costpoint CRM Dashboard, which is the welcome screen that provides each user with quick links to the most frequently accessed parts of the system. Removing access rights will prevent users from selecting Web Dashparts. For more information about the Costpoint CRM Dashboard and dashparts, see the Dashboard book in the Costpoint CRM Online Help system.

To select the Web dashparts a role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **Web Dashparts**.
5. Select the **Allow users to add webparts** option if the role will have full access to add Web Dashparts to the Costpoint CRM Dashboard. This means that the role can use the Configuration menu on the Dashboard to both copy existing Web Dashparts to their Dashboard, and add new Web Dashparts to their Dashboard.

   If this option is NOT selected, users with access to Web Dashparts will only be able to copy existing URLs onto their Dashboard; they will NOT be able to add new URLs to their Dashboard.
6. Select the appropriate action:
   - **To assign full access to specific dashparts**. Select the dashpart(s) that you want the role to be able to access from the Available Web Dashparts column and click **Add**. Costpoint CRM moves the selected dashparts from the Available Web Dashparts column to the Selected Web Dashparts column. These dashparts are now accessible by this role.
   - **To remove accessibility to dashparts**. Select the dashparts that you want to remove from the Selected WebDashparts column and click **Remove**. Costpoint CRM moves the selected dashparts from the Selected Web Dashparts column to the Available Web Dashparts column. These dashparts are no longer accessible by this role.
   - **To assign a dashpart globally to all Costpoint CRM roles**. Select the dashpart that you want the role to access from the Available Web Dashparts column and click **Make items global to all roles**. This dashpart is listed in the Selected Web Dashparts column for all Costpoint CRM roles, with a "Y" under the Global column indicating it is a global assignment.
   - **To remove a dashpart from a global assignment**. Select the dashpart that you want to remove and click **Make global items role specific**. Costpoint CRM asks you to confirm the change. Click **Yes** to continue. This role remains listed in the Selected Web Dashparts column for the current role, but has an "N" under the Global column indicating it is not a global assignment.
7. Click **Save**.

Report Favorites Function

Use the Favorite Reports function to assign report favorites either by individual role, or globally to several Costpoint CRM roles. The features on this function work in conjunction with Costpoint CRM Reporting. You must use the Organize Favorite Reports dialog to configure favorite reports before assigning favorite reports to one or more roles. For more information on Favorite Reports, see the Costpoint CRM Online Help system.

To assign the favorite reports a role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **Favorite Reports**.
5. From the **Report Type** field, select the type of report to which you will assign favorites.
6. The Available Favorites column lists favorites that are not global to all roles, and are not selected for the current role. The Favorites for this Role column lists all favorites the current role can access. Use these columns to configure report favorites for the current role, or globally for all roles.
7. Select the appropriate action:

   - To add report favorites to the Favorites for this Role column:

     Select the report favorites that you want the role to access from the Available Favorites column and click **Add**. Costpoint CRM moves the selected favorites from the Available Favorites column to the Favorites for this Role column.

   - To remove report favorites from the Favorites for this Role column:

     Select the report favorites that you want to remove and click **Remove**. Costpoint CRM moves the selected reports from the Favorites for this Role column to the Available Favorites column.

   - To assign a favorite globally to all Costpoint CRM roles:

     Select the report favorite that you want the role to access from the Available Favorites column and click **Make Favorite global to all roles**. This favorite is listed in the Favorites for this Role column for all Costpoint CRM roles.

   - To remove a report favorite from a global assignment:

     Select the report favorites that you want to remove and click **Make global favorites role specific**. This role is listed in the Favorites for this Role column for the current role, and in the Available Favorites column for all other roles.

8. Click **Save**.

Lookups Function

Use the Lookups function to assign access rights to lookups for each Costpoint CRM role. Lookups allow you to select a certain group of records based on specific fields and values for those fields. For example, you may want to run a Contract report for only those contracts belonging to the Boston team. In this case you would perform a contract lookup and set the **Team** field equal to **Boston**. This returns a list of only contracts belonging to the Boston team.

Within Security, you define what search fields can be accessed in order to perform a lookup.

To select the lookups a role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **Lookups**.
5. From the **Report Type** field, select the type of Info Center lookup to which you will assign rights.
6. Select the appropriate action:
   - To assign full access rights to all lookups automatically:

     Select the **Full access to all lookups** option. Costpoint CRM enables full access to all lookup types listed on this form.
   - To assign full access to specific lookups:

     Deselect **Full access to all lookups** and from the **Type** field, select a specific category of search fields. This brings up a list of available lookup fields within that category.

     Select the lookups that you want the role to access from the Available Fields column and click **Add**. Costpoint CRM moves the selected lookups from the Available Fields column to the Fields for this Lookup column.
   - To remove accessibility to lookups:

     Select the lookups that you want to remove and click **Remove**. Costpoint CRM moves the selected lookups from the Fields for this Lookup column to the Available Fields column.
7. Click **Save**.

Merge Templates Function

Use the Merge Templates function to establish a role's access rights to the merge templates within each Costpoint CRM module. You may use this tab after you have uploaded merge templates to the Costpoint CRM database.

Only RTF templates are stored in the Costpoint CRM database.

Available templates are shown in the Available column. Selected templates are shown in the Templates for this Role column. This tab lists Costpoint CRM's standard merge templates, as well as any custom templates created by your team.

To select the templates a role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the **Find** field.
4. From the **Functional Area** field, select **Merge Templates**.
5. From the **Info Center** field, select the Info Center to which you will assign merge templates.
6. Select the appropriate action:
    - To assign full access rights to all merge templates automatically:

      Select the **Full access to all merge templates** option. Costpoint CRM enables full access to all merge templates listed on this form.
    - To assign full access to specific merge templates:

      From the **Info Center** field, select the Info Center where the merge template that you want to give access to resides. From the Available Templates column, select the template(s) that you want the role to be able to access and click **Add**. Costpoint CRM moves the selected template from the Available Templates column to the Templates for this Role column. These templates are now accessible by this role.
    - To remove accessibility to merge templates:

      Select the templates that you want to remove from the Templates for this Role column and click **Remove**. Costpoint CRM moves the selected templates from the Templates for this Role column to the Available Templates column. These templates are no longer accessible by this role.
7. Click **Save**.

Reports Function

Use the Reports function to assign a role's access rights to reports for each Costpoint CRM role. The list of available reports, as shown in the Available Reports column, is based on the reports that are set up in Costpoint CRM Reporting.

To select the reports a role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven’t already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **Reports**.
5. From the **Report Type** field, select the type of report you will be using.
6. From the **Custom Type** field, select the type of custom report, if necessary.
7. Select the appropriate action:
   - To assign full access rights to all reports automatically:

     Select the **Full access to all reports** option. Costpoint CRM enables full access to all report types listed on this form.
   - To assign full access to specific reports:

     Deselect **Full access to all reports option**; and from the **Type** field, select a type of report that the role can access.

     Use the **Custom Type** field to further refine the type of reports the role can access. Select the reports that you want the role to be able to access from the Available Reports column and click **Add**. Costpoint CRM moves the selected reports from the Available Reports column to the Reports for this Role column.
   - To assign column and group security to an individual report:

     Deselect the **Full access to all reports**; option and from the **Type** field, select a type of report that the role can access.

     Use the **Custom Type** field to further refine the type of reports the role can access. Select the reports that you want the role to be able to access from the Available Reports column and click **Add**. Costpoint CRM moves the selected reports from the Available Reports column to the Reports for this Role column.

     Select the reports that you want to assign column and group security for from the Available Reports column. Click **Set Column/Group Access** and complete the procedures for “Set Column Security for a Report” and “Set Group Security for a Report” below.
   - To remove reports from the Reports for this Role column:

     Select the reports that you want to remove and click **Remove**. Costpoint CRM moves the selected reports from the Reports for this Role column to the Available Reports column.

8. Click **Save**.

Set Column Security for a Report

Set column security restricts access to report columns based on the assigned role. For example, you do not want a CRM role to see certain accounting columns in reports, so you set the column security accordingly.

To set column security for a report:

1. Follow the procedure above for the Report Function.
2. Click **Set Column/Group Access**. Costpoint CRM displays the Report Column and Group Fields form.
3. Select the appropriate action:
   - If the role will have access to all columns in the report, select the **All Columns** option and click **Save**.
   - Or, if the role will have access to specific columns, select **Set Column Security** at the top of the grid. Costpoint CRM displays the Available Columns dialog. Select the columns you wish to display on the report from the Available Columns dialog and click **Add**. The columns move to the Columns for this Report box. Click **Save** to save your entry.
   - To remove columns from the report, select the columns from the Columns for this Report box and click **Remove**. The columns are moved back to the Available Columns box.
4. Click **Save**.

Set Group Security for a Report

Set group security restricts access to report groups based on the role. For example, you do not want a CRM role to see certain accounting groups in reports, so you set the group security accordingly.

1. Follow the procedure above for Report Function.
2. Click **Set Column/Group Access**. Costpoint CRM displays the Column and Group Security form.
3. If you haven’t already done so, select the role type using the binoculars in the **Find** field.
4. Select the appropriate action:
   - If the role will have access to all groups in the report, select the **All Groups** option and click **Save**.
   - Or, if the role will have access to specific groups, select **Set Group Security** at the top of the grid. Costpoint CRM displays the Available Groups dialog. Select the groups you want to display on the report from the Available Groups dialog. Click **Add**. The groups move to the Groups for this Report box. Click **Save** to save your entry.

- To remove groups from the report, select the groups from the Groups for this Report box and click **Remove**. The groups are moved back to the Available Groups box.

5. Click **Save**.

Report Printers Function

Use the Report Printers function to assign access rights to server printers for each Costpoint CRM role. The list of available printers, as shown in the Available Printers column, is based on the printers that are set up on the report server machine. Selected printers are shown in the Printers for this Role column.

To select the printers a role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the Functional Area field, select **Report Printers**.
5. Select the appropriate action:
   - To assign full access rights to all printers automatically:

     Select the **Full access to all printer**s option. Costpoint CRM enables full access to all printers.
   - To assign full access to specific printers:

     Deselect the **Full access to all printers** option.

     Select the printers that you want the role to be able to access from the Available Printers column and click **Add**. Costpoint CRM moves the selected printers from the Available Printers column to the Printers for this Role column. These printers are now accessible by this role.
   - To remove printers from the Printers for this Role column:

     Select the printers that you want to remove and click **Remove**. Costpoint CRM moves the selected printers from the Printers for this Role column to the Available Printers column.
6. Click **Save**.

Saved Options Function

There are certain combinations of report option settings that users may frequently use. You can assign these report options to each role for use with Costpoint CRM Reporting.

To select the saved options the role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **Saved Options**.
5. From the **Option Type** field, select the type of option to which you will assign saved options.
6. The Available Options column lists options that are not global to all roles, and are not selected for the current role. The Options for this Role column lists all options the current role can access. Use these columns to configure report options for the current role, or globally for all roles.
7. Select the appropriate action:
   - To add accessibility to options:

     Select the options that you want the role to access from the Available Options column and click **Add**. Costpoint CRM moves the selected options from the Available Options column to the Options for this Role column.
   - To remove accessibility from options:

     Select the options that you want to remove and click **Remove**. Costpoint CRM moves the selected options from the Options for this Role column to the Available Options column.
   - To assign an option globally to all Costpoint CRM roles:

     Select the option that you want the role to access from the Available Options column and click **Make items global to all roles**. This option is listed in the Options for this Role column for all Costpoint CRM roles, with a "Y" under the Global column indicating it is a global assignment.
   - To remove an option from a global assignment:

     Select the option that you want to remove and click **Make global items role specific**. Costpoint CRM asks you to confirm the change. Click **Yes** to continue. This role remains listed in the Options for this Role column for the current role, but has an "N" under the Global column indicating it is not a global assignment.
8. Click **Save**.

Saved Searches Function

You may assign a set of saved search criteria that will be available for each lookup type when users conduct a standard or advanced search. There are two types of searches:

- Global Searches may be accessed by all users who share the same role(s) and access rights.
- Personal Searches are created and saved by individual users, and are not shared with other users.

To select the saved searches the role can access:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **Saved Searches**.
5. From the **Lookup Type** field, select the type of lookup to which you will assign saved searches.
6. The Available Searches column lists searches that are not global to all roles, and are not selected for the current role. The Searches for this Role column lists all searches the current role can access. Use these columns to configure report searches for the current role, or globally for all roles.
7. Select the appropriate action:

   - **To add accessibility to searches.** From the Available Searches column, select the searches that you want the role to access and click **Add**. Costpoint CRM moves the selected searches from the Available Searches column to the Searches for this Role column.
   - **To remove accessibility from searches**. Select the searches that you want to remove and click **Remove**. Costpoint CRM moves the selected searches from the Searches for this Role column to the Available Searches column.
   - **To assign a search globally to all Costpoint CRM roles**. Select the search that you want the role to access from the Available Searches column and click **Make items global to all roles**. This search is listed in the Searches for this Role column for all Costpoint CRM roles, with a "Y" under the Global column indicating it is a global assignment.
   - **To remove a search from a global assignment**. Select the search that you want to remove and click **Make global items role specific**. Costpoint CRM asks you to confirm the change. Click **Yes** to continue. This role remains listed in the Searches for this Role column for the current role, but has an "N" under the Global column indicating it is not a global assignment.
8. Click **Save**.

Application Tabs Function

Use the Application Tabs function to establish a role's access rights to the tabs within different Costpoint CRM applications. This includes all tabs, even custom tabs added to Costpoint CRM by your firm. You will want to consider whether the user is an accounting or CRM user when determining which tabs they will be able to access.

Available tabs are shown in columns that say “hidden” or “viewable.” All hidden tabs will not be accessible by the role; all viewable tabs will be accessible. Note that you cannot hide the General tab in any module.

To select the application tabs a role can access:

1. Select Application Tabs from the Functional Area drop-down.
2. To assign full access rights to all tabs automatically, select the Full access to all tabs option. Costpoint CRM selects every option on this form to enable full access to all tabs. Selecting this option overrides the ability to assign access rights to specific tabs.
3. For planning purposes, it is important to note that selecting this option means that all tabs added in future versions of Costpoint CRM will be available automatically. To keep this from happening automatically, manually select all boxes in the tree instead of using the Full access to all tabs option.

   OR

   To assign or remove access rights to/from specific tabs, use the Application drop-down menu to select the area to which you will assign tab information.
4. Select the appropriate action.
5. To assign access rights to tabs:

   From the Hidden Tabs column, select the tabs that you want the role to be able to access and click Add. Note that any custom tabs also display in this list. (You may hold down the CTRL key to multi-select tabs.) Costpoint CRM moves the selected tabs from the Hidden Tabs column to the Viewable Tabs column. These tabs are now accessible by this role.
6. To remove accessibility to tabs:

   Select the tabs that you want to remove from the Viewable Tabs column and click Remove. (You may hold down the CTRL key to multi-select tabs.) Costpoint CRM moves the selected tabs from the Viewable Tabs column to the Hidden Tabs column. These tabs are no longer accessible by this role.

System Dashparts Function

Use the System Dashparts function of Role Security to establish access rights to the standard portions of the Costpoint CRM Dashboard. The Costpoint CRM Dashboard is the welcome screen that provides each user with quick links to the most frequently accessed parts of the system.

After a role's dashparts have been established, each user can configure their own dashboard according to what they need and how they use the system. Thus, selecting dashparts for a role only determines what the users assigned to that role can select from, not what they will actually view.

To select the users available for a role:

1. Click Configuration from the Costpoint CRM Main Menu.
2. Click Security, Roles.
3. Select the Access Rights tab.
4. Select System Dashparts from the Functional Area drop-down.
5. Select the appropriate action:
   - To assign full access rights to all dashparts automatically:

     Select the Full access to all dashparts option. Costpoint CRM enables full access to alldashparts types listed on this form, and moves all dashparts into the Dashparts for this Role column.
   - To assign full access to specific dashparts:

     Select the dashpart(s) that you want the role to be able to access from the Available Dashparts column and click Add. (You may hold down the CTRL key to multi-select dashparts.) Costpoint CRM moves the selected dashparts from the Available Dashparts column to the Dashparts for this Role column. These dashparts are now accessible by this role.
   - To remove accessibility to dashparts:

     Select the dashparts that you want to remove from the Dashparts for this Role column and click Remove. (You may hold down the CTRL key to multi-select dashparts.) Costpoint CRM moves the selected dashparts from the Dashparts for this Role column to the Available Dashparts column. These dashparts are no longer accessible by this role.
6. Click Save.

Users Function

Use the Users function to assign users to a role within Costpoint CRM. Available users are listed in the Available Usernames column, and selected users are listed in the Usernames for this Role column.

You can also use the Users tab of Role Security to create groups of users who are assigned the same role.

To select the users available for a role:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Select the Access Rights tab.
3. If you haven't already done so, select the role type using the binoculars in the **Find** field.
4. From the **Functional Area** field, select **Users**.
5. From the **Role** field, select the role for which you want to view available users.
6. Select the appropriate action:
    - To add users to a role:

      From the Available Usernames/Role column, select the users that you want to add to the role and click **Add**. Costpoint CRM moves the selected users to the Usernames for this Role column. These users are assigned to this role.
    - To remove users from a role:

      From the Usernames for this Role column, select the users that you want to remove and click **Remove**. Costpoint CRM moves the selected users from the Usernames for this Role column to the Available Usernames/Role column.
7. Click **Save**.

Create Users and Passwords

Users are individuals who use the Costpoint CRM application. While implementing Costpoint CRM security, you must create user records for every individual who will use Costpoint CRM.

There are several methods for creating users:

Recommended Method

- Use the Generate Users tab to create multiple users by associating usernames with employee numbers or records already entered in the Costpoint CRM Employee Info Center. This is the recommended method for creating users because you can create the usernames, assign users to a role, and generate passwords at one time.
- Use the Users tab to create new users from scratch. Use this option to create new users who have never had information entered in the Costpoint CRM system.
- Use the copy users function to copy an existing user's record, modify the record, and save changes to create a new user. When you copy a user, the new user automatically inherits the first user's access rights and privileges, including record level security.

After creating users, it is necessary to establish password policies for Costpoint CRM. Use the Password Policies tab to establish and maintain system-wide password policies. Costpoint CRM verifies users when they log onto Costpoint CRM with their username and password. The user may not change their username, but may change their password after the initial log in.

Upon log in, Costpoint CRM identifies the user as having a specific role. Roles define the user's access rights and determine what actions the user may perform within Costpoint CRM. Each user must be assigned to one role. You may also assign multiple users to the same role, which is useful for grouping together employees with the same access rights so you do not have to repeatedly define the same security settings for every employee.

Create New Users from Scratch

This procedure is for users who do not already exist as employees in the Employee Info Center. After you create a new user from scratch, you may also add that new user to the Employee Info Center. For more information on the Employee Info Center, see the Employee Info Center book in the Costpoint CRM Online Help system.

You may also create new users based on existing employee records.

You may use this form to enable all or disable all users at one time. This is helpful for times when you need to quickly lock all users out of Costpoint CRM (for maintenance purposes, etc.), and then bring them back on.

To create a new user from scratch:

1. Click **Configuration, Security, Users and Passwords** from the Costpoint CRM main menu.
2. Select the Users tab.
3. Click **Insert** on the upper right of the Users grid. Costpoint CRM inserts a blank row on the grid.
4. Complete the fields on this tab, as follows:

Field	Description
Username	Enter a username.The username differs from the employee name because a username is a name that you assign to an employee, where the employee name is the name the employee uses for identification purposes. Usernames are used to identify a user or group of users throughout the Costpoint CRM database. For example, for an employee named Jack R. Hirte, you might assign a username of JHirte. This is the name that is stored in the Costpoint CRM User table, and that the Costpoint CRM role is linked to. The format for the username is defined in the **Name Type** field on the Generate Users tab of User Security. You may select a specific format for the username.
	For example, the name type [last][firstInit][midInit] would display the user name Richard M. McCandess as follows: McCandessRM Note that if using Integrated Security, the **Username** field is disabled and your Windows username automatically displays in this field.

Field	Description
Integrated Enabled	Select this option to set up the user for Windows Integrated Security. This allows the user to run Costpoint CRM without logging in to Costpoint CRM, as long as the user is logged onto Windows using the proper network credentials. More specifically, the log in page will detect the NT/Windows 2000 username and domain, and attempt to log onto Costpoint CRM with that username. If the username exists as a valid Costpoint CRM user with a valid role, the log onto Costpoint CRM is allowed without the login page ever displaying. Selecting this option disables the **Password** field and enables the **Domain** field. If users is not logged onto the network, they will be prompted for their network identification and password.
Password	Enter the password, making sure to document and save it in another location. For security purposes, after you enter and save a password, Costpoint CRM converts it to an encrypted password that is stored in the database. In other words, the password you entered will not be the string of characters that displays in the **Password** field; the characters represent the encrypted password, and cannot be converted back to the original password. Note that if a user's password is left blank on the Users tab, the user must leave the password field blank when logging onto Costpoint CRM. Otherwise, if the users enter any characters in the password field, they will not be able to log onto Costpoint CRM. You may go back at any time, though, and change the user's record to include a password in this field. Note that the Password function is disabled if Integrated Security is selected.

Field	Description
Role	Select the user's or group of users' role. The user's role determines what information the user can access in Costpoint CRM. Each user must have one assigned role. When you are configuring Costpoint CRM for the first time, only those standard or default roles created by Costpoint CRM appear in the list of available roles. Once you have created the desired role, return to this tab. The created role will appear in the drop-down list. If you want to create your own roles, or modify the existing standard roles, you need to do so in Security/Roles. See "Create Roles" on page 173.
Disable	Select this option to disable the selected user from the Costpoint CRM application. Disabling a user revokes his or her ability to use Costpoint CRM. If this option is not selected, the user is automatically enabled to use the Costpoint CRM application.

Field	Description
Employee Number	Enter the unique identification number associated with this employee. Or, click on the **Find** button in this field to search for and select a record from your database. If you prefer to create a generic user (“Admin” for example), you may do so and not enter an employee number. A username that is not assigned an employee number will not be able to access the parts of Costpoint CRM that require a user number, but can still use other parts of the system. When you enter a number in this field, Costpoint CRM automatically creates a relationship between the selected employee record and the username entered. This relationship is important for personal timesheet entry, expense entry, and other employee functions. As a general rule, there should be a one-to-one correlation between usernames and Costpoint CRM employees. However, an example of a time when you might have a username not associated with an employee is when there is an outside consultant who does not need to log onto Costpoint CRM Time and Expense.
Name	This field displays the user's employee name, based on the employee number selected in the **Employee Number** field. This name should match the name the employee uses for identification purposes, and should differ from the username.
Domain	Select the user's domain server name, which is necessary for Windows Integrated Security. This field displays when the **Integrated** option is selected, and lists the available domain servers.
Support User	If using Deltek's e-support Web site, enter a username for the support site. You may use a maximum of twelve characters for the Support Username.
Support Pswd	If using Deltek's e-support Web site, enter a password for the support site. You may use a maximum of twelve characters for the Support Password.

Field	Description
Report Printer	Select the user's Report Printer to determine which printer is the user's default printer. The options available in this list depend on the Report Printers defined on the Report Server Printers tab.
Progressive Viewing	Select this option to have Costpoint CRM open the first page of a report before the other pages of the report finish generating. Costpoint CRM selects this option by default.
Default Font	Select the default font for the report.

Field	Description
Page Size	From the drop-down list, select the default page size for Costpoint CRM reports for a user. The options are: • **Letter** • **Legal** • **Ledger** • **Tabloid** • **A4** • **A3** • **Executive** • **Custom** The width and height of the page size that you select in this field display in the **Page Width** and **Page Height** fields in the grid. When you select the **Custom** size, the **Page Width** and **Page Height** fields are enabled so you can enter a width and height of your choice. The page size entered in this grid prefills on the Reporting tab of User Options, which users can modify. Users can also modify the page size of a report on the Layout tab of the Options form (for reports that have options) before they print the report. For mailing label reports, the page size is on the General tab.

Field	Description
Page Width and Height	These fields display the page width and height for reports based on what you enter in the **Page Size** field. The page width and height measurements display in either inches or millimeters based on which one you selected in the **Unit of Measure** field on this tab. **Inches** The page size dimensions (width x height) in inches are as follows: Letter — 8.5 x 11 Legal — 8.5 x 14 Ledger — 7 x 11 Tabloid — 11 x 17 A4 — 8.3 x 11.7 A3 — 11.7 x 16.5 Executive — 7.25 x 10.5 Custom — Enter the width and height. **Millimeters** The page size dimensions (width x height) in millimeters are as follows: Letter — 216 x 279 Legal — 216 x 356 Ledger — 432 x 279 Tabloid — 279 x 432 A4 — 210 x 297 A3 — 297 x 420 Executive — 184 x 267 Custom — Enter the width and height.
Margin fields: Enter inches or millimeters based on which one you entered in the **Unit of Measure** field in this grid.	
Top Margin	Enter the top margin for a report page.
Bottom Margin	Enter the bottom margin for a report page.
Left Margin	Enter the left margin for a report page.

Field	Description
Right Margin	Enter the right margin for a report page..
Unit of Measure	From the drop-down list, select the unit of measure to use when you enter the following report measurement fields on this tab for a user: • **Page Height** • **Page Width** • **Top Margin** • **Bottom Margin** • **Left Margin** • **Right Margin** The Unit of Measure options are: • **Inches** • **Millimeters** The unit of measure entered in this grid prefills on the Reporting tab of User Options, which users can modify.
Default Country	This drop-down lists all values from the Country Code Table in General Configuration. Select the country to populate the user's Default Country in User Options. The default for this value is blank.

5. Click **Save**.

If necessary, you may also use this form to enable all or disable all users at one time. This is helpful for times when you need to quickly lock all users out of Costpoint CRM (for maintenance purposes, etc.), and then bring them back on.

Create New User from Existing Employee Record

Note that employee information cannot be modified on this form; you must make changes in the Employee Info Center. See the Costpoint CRM Online Help system for more information.

One way to create new users is to convert existing employees, entered in the Costpoint CRM Employee Info Center, into Costpoint CRM users. Converting existing employees enables you to convert the saved employee name and number into a new user's name. Costpoint CRM uses this information to reference the user throughout the security system.

To create users from existing employee records:

1. Click **Configuration**, **Security**, **Users and Passwords** from the Costpoint CRM main menu.
2. Select the Generate Users tab.

   This tab lists all employees that exist in the Employee Info Center but have not been assigned a username on the Users tab of Users and Passwords Configuration.
3. In the Employee Name and Number grid, select the employee that will become a user.

   You can also create multiple users. To select multiple users in any order, hold down the **Ctrl** key and select the users. To select multiple users in sequential order, hold down the **Shift** key and select the users. To select all users listed in the grid, click **Select All**.
4. Complete the fields on this tab, as follows:

Field	Description
Generation Defaults	
Role	Select the user's, or group of users' role. The user's role determines what information the user can access in Costpoint CRM. Each user must have one assigned role. When you are configuring Costpoint CRM for the first time, only those standard or default roles created by Costpoint CRM appear in the list of available roles. Once you have created the desired role, return to this tab. The created role will appear in the drop-down list. If you want to create your own roles, or modify the existing standard roles, you need to do this in Security/Roles. See "Create Roles" on page 173.

Field	Description
Name Type	Select the format for the user name. For example, the type [last][firstInit][midInit] would create the user name Richard M. McCandess as follows: **McCandessRM**
Password	Use this drop-down list to select the format for the user password. For example, the type [last][firstInit] would set the initial password in a last name and first initialformat. For example, the password for Richard M. McCandess would be: **McCandessR**
Printer	Select the default printer for the user.
Active Employees Only	Select this option to display active employees only in the Employee Name and Number grid. These are employees designated with a status of Active on the General tab of the Employee Info Center.

5. Click **Generate** to generate the new user and their username.

   When completed, the new user and his or her associated information displays on the Users tab of User Security. You may modify the user's information on this grid.

Set Up Password Policies

Use the Password Policies tab of User Security to establish settings for user passwords, including the number of login attempts allowed, and expiration rules. This is strictly an administrative function.

To establish password policies:

1. Click **Configuration**, **Security**, **Users and Passwords** from the Costpoint CRM main menu.
2. Select the Password Policies tab.

3. Complete the fields on this tab, as follows:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Minimum password length</td><td>Enter a numeric value for the minimum password length. This value dictates the user requirements for every password entry, and can be between 0 and 20 characters. For example, a password length of 5 means every user password must be at least 5 characters in length.</td></tr>
<tr><td>Require at least one digit in all passwords</td><td>Select this option to require one number within each password.</td></tr>
<tr><td>Require at least one special character in all passwords</td><td>Select this option to require a special character within each password.

Special characters include the following keyboard options:

<table>
<tr><td>|</td><td>Pipe</td><td>~</td><td>Tilde</td></tr>
<tr><td>!</td><td>Exclamation point</td><td>@</td><td>At sign</td></tr>
<tr><td>#</td><td>Pound sign</td><td>$</td><td>Dollar sign</td></tr>
<tr><td>%</td><td>Percent sign</td><td>^</td><td>Caret</td></tr>
<tr><td>&</td><td>Ampersand</td><td>*</td><td>Asterisk</td></tr>
<tr><td>(</td><td>Left parenthesis</td><td>)</td><td>Right parenthesis</td></tr>
<tr><td>-</td><td>Minus</td><td>_</td><td>Underscore</td></tr>
<tr><td>+</td><td>Plus</td><td>=</td><td>Equals</td></tr>
<tr><td>{</td><td>Left brace</td><td>}</td><td>Right brace</td></tr>
<tr><td>[</td><td>Left bracket</td><td>]</td><td>Right bracket</td></tr>
<tr><td>\</td><td>Back slash</td><td>/</td><td>Forward slash</td></tr>
<tr><td>?</td><td>Question mark</td><td><</td><td>Less than</td></tr>
<tr><td>></td><td>Greater than</td><td></td><td></td></tr>
</table></td></tr>
<tr><td>Passwords expire after x days</td><td>Enter a numeric value for the number of days before a password expires. Options include: 0, 30, 60, 90, 180, or 360 days. If you enter 0, the password will never expire.

Once a password expires, the user is locked out of Costpoint CRM until they change their password.</td></tr>
</table>

Field	Description
Do not allow passwords to be reused for *x* days	Enter a numeric value for the number of days during which a password is not allowed to be reused. Options include: 0, 30, 60, 90, 180, or 360 days. If you enter **0** in this field, there are no restrictions on password reuse. However, if you change the password, the new password entry may not match the old password entry. You cannot use the old password entry until the reuse setting (0, 30, 60, 90, 180, or 360 days) has been satisfied.
Disable users after n invalid login attempts	Enter a numeric value for the number of invalid login attempts allowed before a user is disabled from using Costpoint CRM. (Each time a login is successful, the counter will clear and restart at zero.)
	After a user is locked out of Costpoint CRM due to failed login attempts, his or her password will not work until the administrator reinstates his or her access rights. The administrator must go to the Users tab and de-select the **Disable Login** option for the user. When a user's account is disabled due to failed login attempts, he or she will receive a message from Costpoint CRM stating his or her account has been disabled.

4. Click **Save.**

Assign Multiple Users to a Role

After creating Costpoint CRM users, you may assign multiple users, who share the same security privileges, to the same role. Establishing user groups is useful for bringing together employees with the same access rights so you do not have to repeatedly define security settings for each employee.

For example, if your Marketing department is divided into different sub-groups (Marketing Communication and Product Management), you can create two different roles for each of these sub-groups. You may then assign access to specific information within Costpoint CRM for each role.

To create a user group:

1. Click **Configuration**, **Security**, **Roles** from the Costpoint CRM main menu. Costpoint CRM displays the Roles form.
2. Use the **Find** field to search for and select the role you will assign to the group.
3. Select the Access Rights tab. See “Users Function” on page 195 for details about adding users to a role.

Enable/Disable User Logons

You can enable/disable all users, or enable/disable one or more users to use Costpoint CRM.

Enable/Disable All Users to Use Costpoint CRM

Enabling All Users

You may enable all users at the same time to use Costpoint CRM. Enabling users activates their access rights and ability to use Costpoint CRM. This is helpful for when you need to quickly bring all users back on Costpoint CRM.

Disabling All Users

You may disable all users from using Costpoint CRM. Disabling users de-activates their access rights and ability to use Costpoint CRM. This is helpful for when you need to quickly lock all users out of Costpoint CRM (for example, when performing system maintenance).

To enable or disable all users:

1. Click **Configuration**, **Security**, **Users and Passwords** from the Costpoint CRM main menu. Costpoint CRM displays the Users and Passwords form.
2. Perform one of the following:
   - To automatically enable all users shown on the User Setup grid, click **Enable All** on the upper right of the User Setup grid.
   - To automatically disable all users shown on the User Setup grid, click **Disable All** on the upper right of the User Setup grid.
3. Click **Save**.

Enable/Disable Single Users to Use Costpoint CRM

Enabling Single Users

You may enable a user to use Costpoint CRM. Enabling a user activates their access rights and ability to use Costpoint CRM. You might use this option after disabling one or all users from the system, and then deciding to re-enable one or more users.

When you enable a user's login, their invalid login attempt total is automatically reset to zero. This is necessary for instances where the user's logon is automatically disabled after five consecutive unsuccessful log in attempts. When a user is disabled, the administrator must logon and re-enable the user's login.

Disabling Single Users

You may disable a user from using Costpoint CRM. Disabling a user de-activates their access rights and ability to use Costpoint CRM, which is helpful when you need to quickly lock a user out of Costpoint CRM (for example, when performing system maintenance).

Costpoint CRM automatically selects the **Disable** option when a user is locked out of Costpoint CRM due to failed login attempts. The administrator must de-select the **Disable** option for the user to reinstate that user's login. When a user's account is disabled due to failed login attempts, he or she will receive a message from Costpoint CRM stating his or her account has been disabled.

To enable/disable a user:

1. Click **Configuration**, **Security**, **Users and Passwords** from the Costpoint CRM main menu.
2. Perform one of the following:
   - To enable a single user, select the username you want to enable in the User Setup grid. Make sure the **Disable** option is not selected. This will enable the user, which activates his or her access rights and ability to use Costpoint CRM.
   - To disable a single user, select the username you want to disable in the User Setup grid. Select the **Disable** option. This disables the selected user(s).
3. Click **Save**.

Windows Integrated Security

Deltek Costpoint CRM includes an option for Windows Integrated Security, which allows users to logon one time for both Windows and the Costpoint CRM application.

Integrated Security is configured to use each user's Windows NT/2000 Domain network login, which automatically logs them onto the Costpoint CRM application. In other words, Integrated Security forces the Costpoint CRM username and password to be the same as the Windows username and password. If users are not properly logged onto their network, they will be prompted for their network identification and password before they can log onto Costpoint CRM.

The steps for implementing Windows Integrated Security are as follows:

1. Configure the Server Directory.
2. Configure the user's information. Refer to the Users tab of Users and Passwords Security. Complete the **Integrated** and **Domain** fields on this tab. See "Create New Users from Scratch" on page 196.
3. Log onto Costpoint CRM and select a database.

Configure Server Directory

To configure the Server Directory:

1. Using Windows 2000 Internet Services Manager (in the Control Panel Administrative Tools), access the IIS Virtual directory (usually called Costpoint CRM). Note that this server must be a member of the domain before it can be accessed.
2. From the Costpoint CRM Properties menu, select the **Directory Security** tab. The Authentication Methods dialog box displays.
3. Click **Edit**.
4. Make sure the **Anonymous Access** option is NOT selected.
5. Make sure the **Basic Authentication** option is NOT selected.
6. Select the **Integrated Windows Authentication** option.
7. Click **OK** to save your changes.
8. Configure the **Integrated** and **Domain** fields on the Users tab of Users and Passwords Security. See "Create New Users from Scratch" on page 196.

Log on to Costpoint CRM Using Integrated Security

After configuring the Server Directory and user's Integrated and Domain information, you may logon to Costpoint CRM using Integrated Security.

To use Costpoint CRM with Integrated Security:

1. Open Internet Explorer and run Costpoint CRM. You do not need to enter a password because your password information is based on your Windows NT/2000 Domain network logon.
2. If you are not properly logged onto the network, you will be prompted for your network identification and password before you can log onto Costpoint CRM. See "Windows Integrated Security" on page 212 for setup information.
3. If only one database exists, you will automatically be logged on at this point. If more than one database exists, you must select the database you want to use unless you have set up your user preferences to always connect to a specific database when using Integrated Security.

9 Auto Numbering

In this chapter...

- Auto Number Source Options

Auto Number Source Options

Create Custom Method

IMPORTANT: This action requires knowledge about Web servers and/or the development of a Microsoft .NET assembly. If you do not have development experience, please contact the Deltek Custom group for assistance. This group provides help on a time and materials basis.

The Custom Method action allows users to call a custom DLL. For example you can use this action to modify your Costpoint CRM database if it doesn't suit your company's needs. You can also use this action as a method of interacting with another outside application or system.

The Custom Method action is the recommended way to write custom code to be executed during auto numbering. Whenever possible, this technique of extending Auto Numbering should be used in lieu of the Web Service action.

To take full advantage of available functionality, the developer should inherit from WorkflowBaseClass – a class shipped with Costpoint CRM in Deltek.Costpoint CRM.WorkflowAPI.dll. This contains methods that allow the custom developer to participate in Costpoint CRM’s transactions. Participating in Costpoint CRM’s transaction is the only way to prevent database locks when reading or updating data involved in the save that triggered the workflow. The QueryData and ExecuteSQL methods are available when inheriting from WorkflowBaseClass to provide a safe way to query and update data in the Costpoint CRM database without having to worry about where the current Costpoint CRM database is or managing connections.

For More Information

For additional technical information, see *Invoking a Custom Method to Process Workflow Actions* on e-Support.

To create a custom DLL:

1. Create a Class Library project in Visual Studio.NET.
2. Add reference to Deltek.CostpointCRM.WorkflowAPI.dll and Deltek.Costpoint CRM.Ancestors.dll located in the Web\bin directory within the Costpoint CRM install directory.
3. Create a new class and inherit from WorkflowBaseClass.
4. Create any method(s) you need.
5. Compile your project.
6. Place resulting DLL in a directory called AutoNumber under the Costpoint CRM install directory. (Create one if not there.)

Note that you may create any number of methods within a single class, and have as many classes as you want per project. You may create any number of projects; all you need to do is copy the resulting DLLs over to the AutoNumber directory.

Your methods may have any number of arguments. The arguments to your methods should be of simple data types (strings, integers, etc.). Only a function can be used to generate an auto number and the Custom Method must return one value of type **String**. You cannot use a subroutine to create this value.

If you compile your project in debug mode, you may copy the PDB file, created during the compile, to the AutoNumber directory as well. In case of errors, the presence of the PDB file will provide you with more detailed error information, including line numbers in your stack trace.

When you select this action, Costpoint CRM displays the Custom Method Configuraiton for Auto Numbering Dialog, as described below.

Custom Method Confiruation for Auto Numbering

IMPORTANT: This auto numbering action requires knowledge about Web servers and/or the development of a Microsoft .NET assembly. If you do not have development experience, please contact the Deltek Custom group for assistance. This group provides help on a time and materials basis.

The Custom Method action allows users to call a custom DLL. For example you can use this action to modify your Costpoint CRM database if it doesn't suit your company's needs. You can also use this action as a method of interacting with another outside application or system.

For the Costpoint CRM auto numbering feature, the Custom Method must return one value of type **String**. You cannot use a subroutine to create this value.

To create a Custom Method action for an auto number:

1. In the Numbering grid (Configuraiton, General, System Settings, Numbering tag), select the system row to which you want to add the action.
2. Select **Custom Method** in the Auto Number Source column.
3. Click the **Detail** button in the Auto Number Format column. Costpoint CRM displays the Custom Method Configuration dialog.
4. Complete the fields on this dialog, as follows:

Field	Description
Assembly	Select the name of the actual Microsoft.Net assembly or the DLL that consists of the custom method that is being invoked. All assemblies located in the AutoNumber directory under the Costpoint CRM install directory are listed here. Note that assemblies or DLLs that are used for custom methods are required to be placed in the above mentioned directory. Costpoint CRM does not provide the option of using an assembly that is located elsewhere.
Class	When a specific assembly is selected from the list, Costpoint CRM automatically reads the assembly and loads the Class dropdown with a list of classes available in the assembly.
Method	The **Method** dropdown field is automatically loaded with a list of methods (functions or subs) available in the selected class. The selected method from the list is the method that will be used when auto numbering conditions are me
Arguments	The list of arguments will be automatically populated based on the Method selected. • **Name**. The name of the parameter to the method. • **Value**. The SQL expression, which will be used to determine the value of the argument at run time. Click on the **Detail** button in this field to display the SQL Expression Builder to define the values.
Test Method	This button becomes active when the **Assembly**, **Class**, and **Method** fields are populated. It allows you to test the custom methods you've written for the auto number. When you click this button, Costpoint CRM displays a dialog containing all the arguments for the method. You may only enter literal values for each of the arguments may be entered and will be converted to the appropriate data type at run time.

5. Click **Save**.

Create Expression

Overview

The Expression action is the most desirable method for creating auto numbers within Costpoint CRM. When using Expressions, you can create an auto number based on any of the fields within the Contracts , Employees, Vendor/Partners, Customers, Opportunities, and Marketing Campaigns info centers.

Expressions allow you to create a custom format for the auto numbering structure. When you select this action, Costpoint CRM displays the Expression Configuration for Auto Numbering dialog, as described below.

Expression Configuration for Autonumbering Dialog

Use the Expression Configuration dialog to automatically create new identification numbers based on existing fields in the selected info center.

This dialog includes a **Sample Value** field which changes to reflect the selections made in the Employee Auto Number Format grid. Refer to the Sample Value field each time you change the auto number structure to view a sample of the new numbering format.

Example

To use the Expression Configuration dialog to create new identification numbers based on existing fields in the selected info center, you could format the fields as shown below.

For the first row on the Customer Auto Number Format dialog:

Item = Character

Default Value = 7

Actual Length = 1

Start Position = 1

Length Used in Number = 1

The first digit in the Sample Value displays as 7.

Then, when you set the second row on the Customer Auto Number Format as follows:

Item = Organization level 1

Default Value = OR

Actual Length = 2

Start Position = 1

Length Used in Number = 2

The second digit in the Sample Value displays as OR, because the length is “2” and the start position is “1”, which puts it immediately next to the first digit as entered in the first grid row.

Then, because the Sequence Length is set to 7, the Sample Value displays as 7OR0000000.

Create Stored Procedure

This action allows you to execute a stored procedure on the Costpoint CRM database. You can easily execute custom SQLs against the Costpoint CRM database without having to write code to deploy via the Custom Method.

This action requires that users know T-SQL and how to write stored procedures.

When you select this action, Costpoint CRM displays the Stored Procedure Configuration for Auto Numbering dialog.

Create Web Service

IMPORTANT: This action requires knowledge about Web servers and/or the development of a Microsoft .NET assembly. If you do not have development experience, please contact the Deltek Custom group for assistance. This group provides help on a time and materials basis.

The Web Service action allows you to invoke a specified Web service. A Web service is a way to call code located on a different machine via HTTP.

The Web Service action should be used when using a third party Web service, or when using Custom Method is not possible. (For example, the code needs to update a database that is not accessible from the Costpoint CRM application server.)

When writing a Web service to be invoked via Auto Numbering, it is crucial that there is no attempt to either read or update the data being updated in the Save operation that triggered the auto number. Doing so will cause the Web service’s database call to be blocked and will result in a database lock. The database call will then time out, and the Web service call will fail.

When you select this action, Costpoint CRM displays the Web Service Configuration for Auto Numbering dialog.

Reasons to use Invoke Web Service rather than the Invoke Custom Method

- Need to call a third party Web service.

- Running the custom code on the Costpoint CRM application server is not possible because the code must reside at a different location.

Reasons to use the Custom Method rather than the Web Service

- As a developer, you do not need to hard code SQL connection strings; you always get access to "current" Costpoint CRM database.
- A lot less code to get/retrieve data as the WorkflowBaseClass provides easy to use methods for this.
- An easy way to send messages back to the user.
- If an error occurs, any changes you made to the Costpoint CRM database will automatically be rolled back.
- Better performance because of having to avoid serialization/deserialization of data, as well as no need for the overhead of making an HTTP call.

For More Information

For information on writing and building Web services using ASP.NET, see http://msdn.microsoft.com/library/default.asp?url=/library/en-us/cpguide/html/cpconbuildingaspnetwebservices.asp.

For information on writing and deploying Web services using ASP.NET and Visual Studio .NET see http://msdn.microsoft.com/library/default.asp?url=/library/en-us/vbcon/html/vbtskDeployingWebServices.asp.

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