

Deltek[®]

Costpoint User Interface Quick Steps



Costpoint User Interface Quick Steps

Shown here are the high-level steps to view the Costpoint User Interface. Some steps include sub-steps.



NAVIGATION



GLOBAL MENU



GLOBAL ICONS



SUBTASKS



SCREEN CONFIGURATION



OTHERS

SUB-STEPS

A

Home Dashboard

Application Preferences

Show Messages & Errors

B

My Menu

Application Layout Changes

View Action and Report Status

C

Open Applications

Global Toolbar Icon Options

Hey Deltek!

D

Show Welcome Screen

Color Theme

Select Company

E

Access an Application

Auto Positioning

Logout

F

Manage User Profiles

G

Configure User Preferences

Navigation

- Use the **Page Down** key to proceed through the Quick Step.
- Use the **Page Up** key to return to a prior slide.

Costpoint User Interface

Navigation



Global Menu



Global Icons



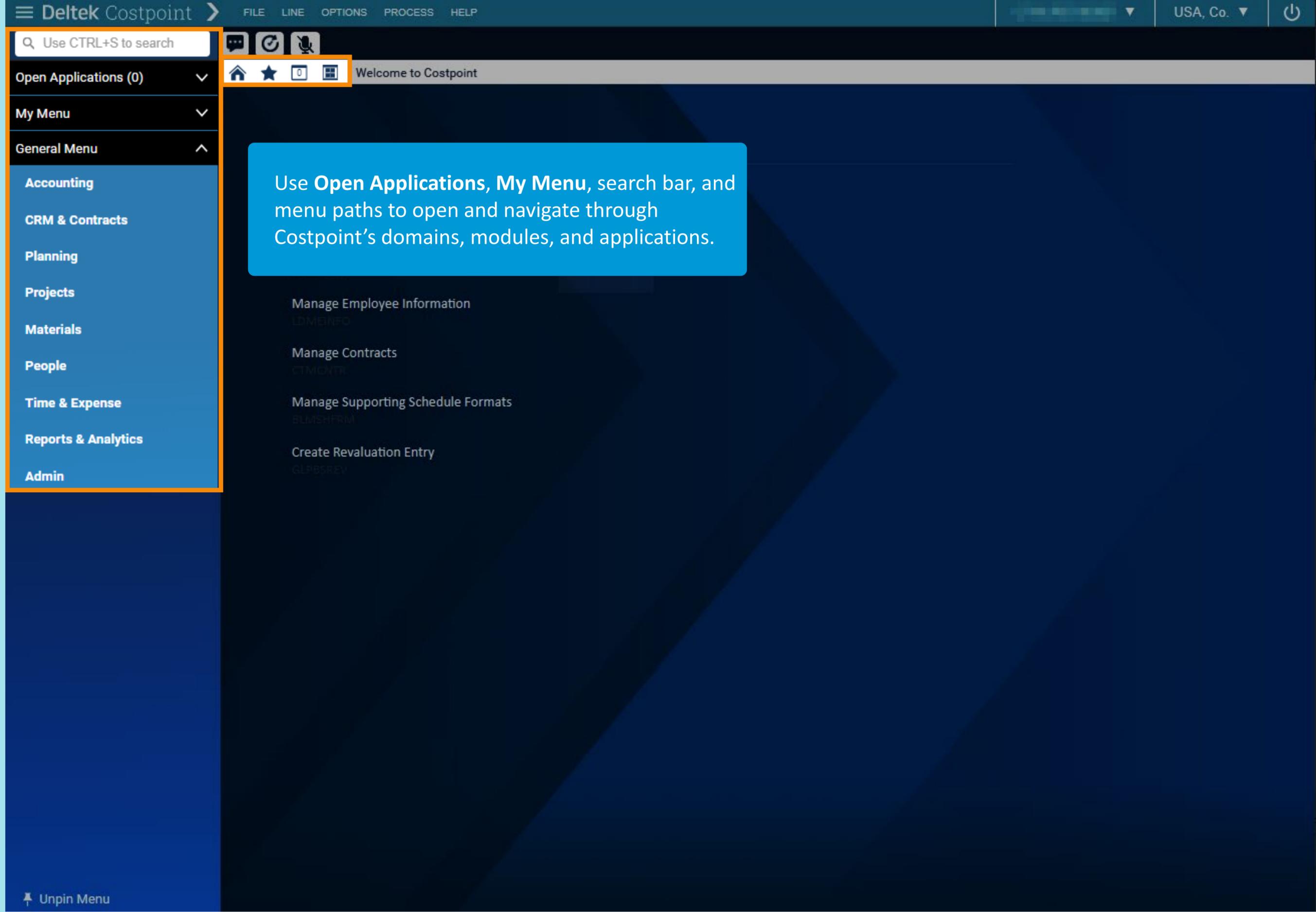
Subtasks



Screen Configuration



Others



Use CTRL+S to search

Open Applications (0)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Use **Open Applications**, **My Menu**, search bar, and menu paths to open and navigate through Costpoint's domains, modules, and applications.

Manage Employee Information

LDMEMINFO

Manage Contracts

CTMONTH

Manage Supporting Schedule Formats

BLMSHPRM

Create Revaluation Entry

GLP65REV

Unpin Menu

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

The screenshot displays the Deltek Costpoint user interface. At the top, there is a header with the Deltek Costpoint logo and navigation tabs: FILE, LINE, OPTIONS, PROCESS, and HELP. Below the header is a search bar with the text "Use CTRL+S to search". To the right of the search bar are icons for chat, refresh, and microphone. Below these icons is a browser-like address bar with a home icon (highlighted with an orange box), a star icon, a document icon, and the text "Welcome to Costpoint".

On the left side, there is a navigation menu with the following items: "Open Applications (0)", "My Menu", "General Menu", "Accounting", "CRM & Contracts", "Planning", "Projects", "Materials", "People", "Time & Expense", "Reports & Analytics", and "Admin".

In the main content area, there is a callout box with the following text: "Click the **Home Dashboard** icon to view actionable data that you access most often, which includes information on your timesheets, pending tasks and workflow approvals, expense reports and authorizations, available leave balances, and outstanding expenses."

At the bottom left of the navigation menu, there is an "Unpin Menu" option with a pin icon.

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

The screenshot displays the Deltek Costpoint user interface. At the top, there is a search bar with the text "Use CTRL+S to search" and a navigation toolbar with icons for home, star, and other functions. The main content area is divided into sections: "My Menu" (highlighted with an orange box), "Recent Activity" (listing "Manage Project User Flow" and "Manage Accounts Payable Vouchers"), and "General Menu". A blue callout box is overlaid on the interface, providing instructions on how to access the "My Menu" feature.

My Menu

Tip: to begin, star applications in the General Menu or setup in Manage My Menu

Manage My Menu

Recent Activity

- Manage Project User Flow
- Manage Accounts Payable Vouchers

My Menu

+

You can access **My Menu** from the following locations:

- Left navigation menu
- Navigation toolbar
- Welcome screen

Use **My Menu** to view applications you are configured to use. If you have the rights, you can add screens to your **My Menu** application list and create navigation banners.

Unpin Menu

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



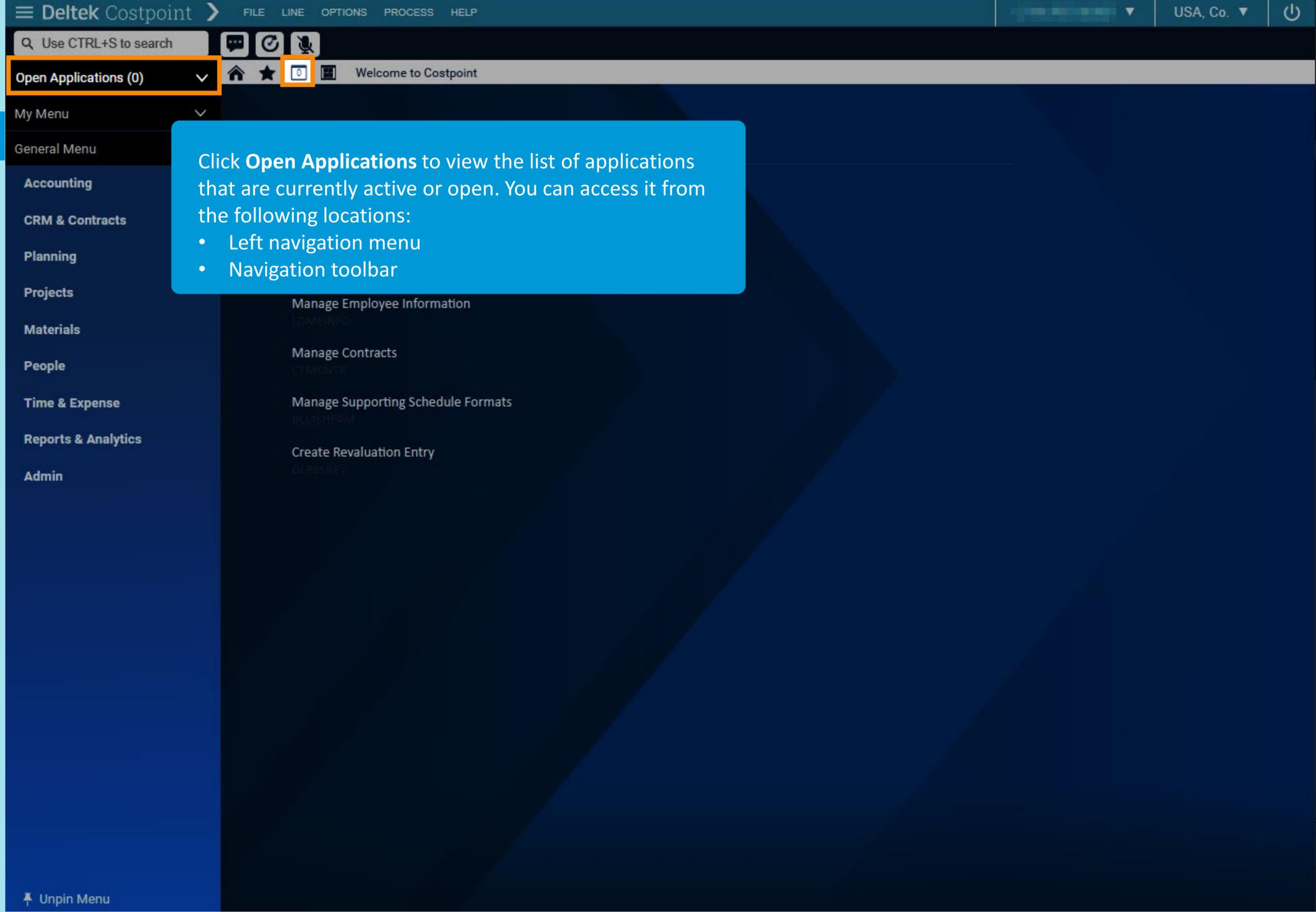
Subtasks



Screen Configuration



Others



Click **Open Applications** to view the list of applications that are currently active or open. You can access it from the following locations:

- Left navigation menu
- Navigation toolbar

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

The screenshot displays the Deltek Costpoint user interface. At the top, the navigation bar includes the Deltek Costpoint logo and menu items: FILE, LINE, OPTIONS, PROCESS, and HELP. Below this is a search bar with the text "Use CTRL+S to search" and a toolbar with various icons. The breadcrumb trail reads: Projects > Project Setup > Project Setup Controls > Configure Project Settings. The main content area shows the "Project Settings" window, which is currently open. A blue callout box with white text is overlaid on the window, stating: "If you have any application open, click the **Show Welcome Screen** icon to display the Welcome screen." The "Show Welcome Screen" icon is a small square with a grid pattern, located in the top toolbar of the application window. The "Project Settings" window contains several sections: "Require Incur" (with checkboxes for "Require Incur" and "Validate Proj"), "Show Period" (checked), "Modifications Effective Date" (set to "Default System Date"), "Track Owing Organization History" (checked), "Use Goal Multipliers for Billable Value Calculations" (unchecked), "Validate Modification Descriptions" (unchecked), "Period of Performance Start and End Dates" (with dropdowns for "Update POP Start Date based on earliest Start Date From" set to "All Modifications" and "Update POP End Date based on latest End Date From" set to "Only mods with latest effective dates"), and "Quick Project Defaults" (with dropdowns for "Owning Organization" and "Account Group", and a checkbox for "Use Quick Project Templates"). At the bottom right of the window, there are links for "Revenue Formulas" and "Corporate Settings".

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



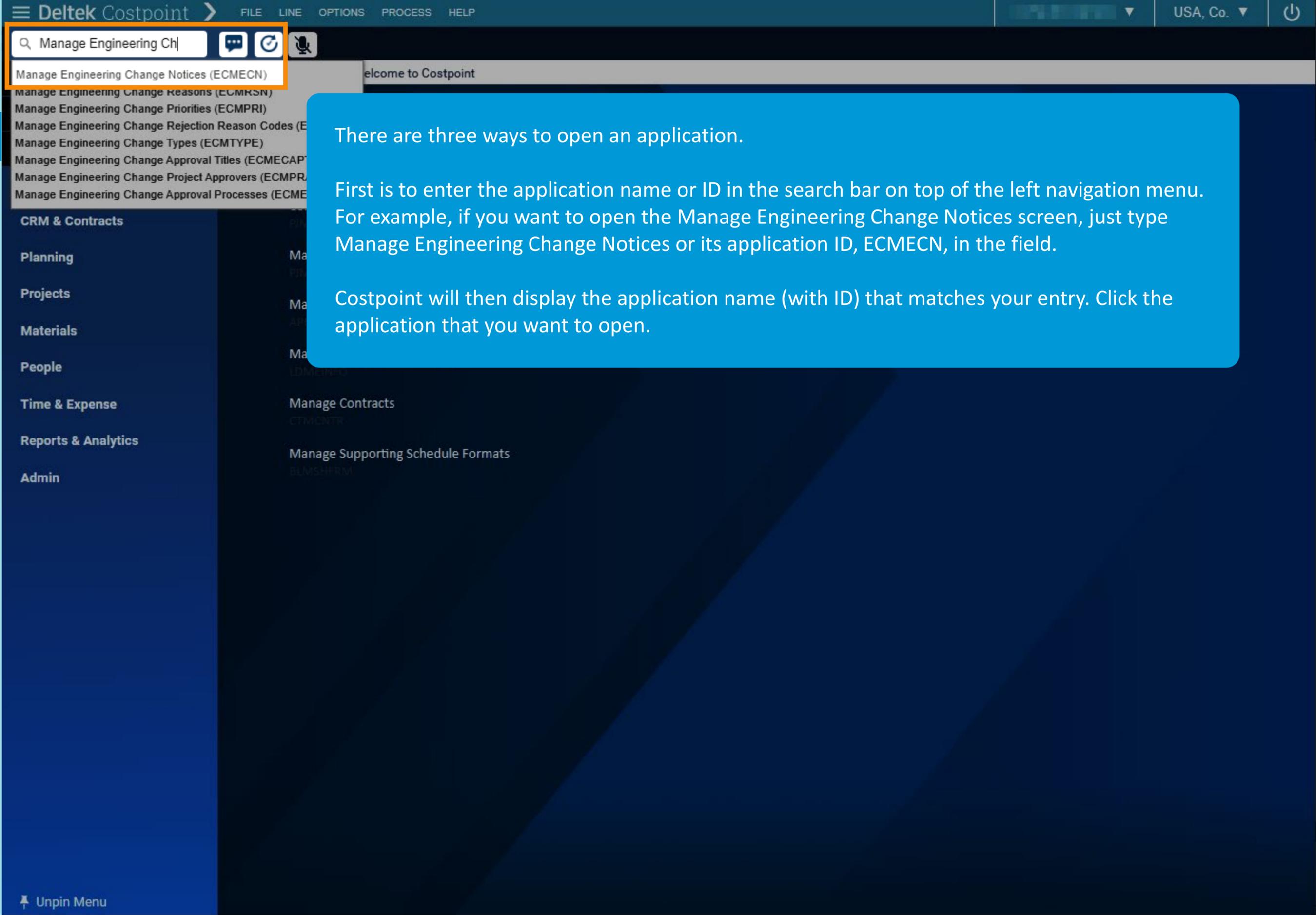
Subtasks



Screen Configuration



Others



There are three ways to open an application.

First is to enter the application name or ID in the search bar on top of the left navigation menu. For example, if you want to open the Manage Engineering Change Notices screen, just type Manage Engineering Change Notices or its application ID, ECMECN, in the field.

Costpoint will then display the application name (with ID) that matches your entry. Click the application that you want to open.

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

Q Use CTRL+S to search

Open Applications (0)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials >

Product Definition >

Bills of Material >

Routings >

Engineering Change Notices >

Procurement Planning >

Purchasing >

Receiving >

Inventory >

Production Control >

Sales Order Entry >

Master Production Scheduling >

Material Requirements Planning >

Materials Estimating >

Supplier Portal >

Engineering Change Processing >

ECN Reports/Inquiries >

ECN Utilities >

Engineering Change Controls >

Manage Engineering Change Notices ☆

Approve Engineering Change Notices

Update Approved Engineering Change Notices

Apply Engineering Change Notices

Print Engineering Change Notice Travelers

Unpin Menu

Second, click the domain that you want to access. The domain's associated modules then display in a panel immediately to the right of the domain list. When you select a module, additional panels display with application groups and related applications available for use.

Your path is highlighted in blue. You can also navigate through the menu by selecting a different item from the previous panel's list.

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

The screenshot shows the Deltek Costpoint user interface. At the top, there is a navigation bar with the Deltek Costpoint logo and menu items: FILE, LINE, OPTIONS, PROCESS, HELP. Below the navigation bar is a search bar with the text "Use CTRL+S to search" and icons for chat, refresh, and microphone. The main content area is divided into two sections: "Recent Activity" and "My Menu". In the "Recent Activity" section, the "Manage Engineering Change Notices" application is highlighted with an orange box. In the "My Menu" section, the "Manage Engineering Change Notices" application is also highlighted with an orange box. Other applications visible in the "My Menu" section include "Manage Project User Flow" and "Manage Fiscal Years".

Accounting
CRM & Contracts
Planning
Projects
Materials
People
Time & Expense
Reports & Analytics
Admin

Unpin Menu

The third way to access an application is through the Welcome screen. If you have recently opened an application, it will display on the **Recent Activity** section, and you can click it to directly go to that application.

If this screen has been added to your **My Menu**, you can open it from the **My Menu** section.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

The screenshot shows the Deltek Costpoint user interface. At the top, there is a navigation bar with tabs: FILE, LINE, OPTIONS, PROCESS, and HELP. The 'PROCESS' tab is highlighted. Below the navigation bar, there is a search bar and a list of open applications. The main content area displays a form for 'Manage Engineering Change Notices'. A dropdown menu is open from the 'PROCESS' tab, showing options: Action Menu, Default Action (with keyboard shortcut Ctrl+Shift+R), View Action and Report Status, File Upload, and File Download. A blue callout box points to the dropdown menu with the text: 'Click options from the Global Menu to access additional functions.' Another blue callout box explains the Global Menu: 'The Global Menu allows you to perform basic functions within the Costpoint application. For example, click the **Process** menu to access the **Action Menu, Default Action, View Action and Report Status, File Upload, and File Download** functions.' A note box at the bottom right states: 'Note: The available functions depend on the application being displayed.'

Click options from the Global Menu to access additional functions.

Global Menu

The Global Menu allows you to perform basic functions within the Costpoint application. For example, click the **Process** menu to access the **Action Menu, Default Action, View Action and Report Status, File Upload, and File Download** functions.

 **Note:**
The available functions depend on the application being displayed.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

Q Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

Manage Engineering Change Notices

Identification

ECN ID

Basic Info Details Customer Information Customer Notes

Type *

Date * 10/02/2023

Status * Pending

Originator

Employee

Organization

Parts Impacted

Line	Action Code *	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part Active

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

Use the global icons to maneuver around Costpoint applications.

Global Icons

They are located on the Costpoint Global toolbar and can be accessed at any time but may depend on the available functions for the current screen.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

The screenshot shows the Deltek Costpoint user interface. The top navigation bar includes the Deltek Costpoint logo, a search bar, and a menu with options: FILE, LINE, OPTIONS, PROCESS, HELP. The breadcrumb trail reads: Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices. The main content area is titled 'Manage Engineering Change Notices' and features a 'Basic Info' tab. A text box explains that subtask links are located in the middle and/or bottom of the main screen. Two rows of subtask links are highlighted with orange boxes: the first row includes 'Impacted Projects', 'Approvals', 'General Notes', 'Technical Notes', 'Implementation Notes', 'Text', 'Documents', 'EC Impacted Groups', and 'User-Defined Info'; the second row includes 'Part Documents', 'MBOM Components', 'MBOM Orig Assy', 'MBOM Chng Assy', 'EBOM Components', 'EBOM Orig Assy', 'EBOM Chng Assy', and 'Routings'. The bottom of the screen shows a table with columns for 'Line', 'Action Code', 'Original Part', 'Original Part Rev', 'Original Part Description', 'Original Part Status', and 'Original Part Active'. A 'Unpin Menu' icon is visible in the bottom left corner.

Subtasks

Subtask links display across the middle and/or bottom of the main screen.

After you complete and save the fields on a screen, or make updates to existing entries, you can use the screen's subtasks to enter additional information about the record. Click the subtask links to access screens where you can enter detailed information for the record.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Deltek Costpoint FILE LINE OPTIONS PROCESS HELP

Q Use CTRL+S to search

Open Applications (1) My Menu General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

Manage Engineering Change Notices

New Copy Delete 1 of 1 New Table Find Query

Identification

ECN ID Description

Basic Info Details Customer Information Customer Notes

Type * Class * -Select- Priority Submit for Approval

Date * 10/02/2023 Reason *

Status * Pending Approval Process

Originator

Employee Name *

Organization Phone

Impacted Projects Approvals General Notes Technical Notes Implementation Notes Text Documents

Parts Impacted New Copy Delete Form Query

Line	Action Code *	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part Active
1						

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

Use the **subtask toolbar** to perform functions specific to the selected subtask. You can scroll over each button for a tooltip.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

Q Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Materials > Engineering Change Notices > Engineering

Manage Engineering Change Notices

Identification

ECN ID Description

Basic Info Details Customer Information Customer Notes

Type Class Priority Submit for Approval

Date Reason Hold

Status Approval Process Revision

Originator

Employee Name

Organization Phone

[Impacted Projects](#) [Approvals](#) [General Notes](#) [Technical Notes](#) [Implementation Notes](#) [Text](#) [Documents](#) [EC Impacted Groups](#) [User-Defined Info](#)

Parts Impacted

Line	Action Code	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part Active

[Part Documents](#) [MBOM Components](#) [MBOM Orig Assy](#) [MBOM Chng Assy](#) [EBOM Components](#) [EBOM Orig Assy](#) [EBOM Chng Assy](#) [Routings](#)

USA, Co.

Click your username to open the Screen Configuration window and see information such as the company name, database, and validation settings.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

The screenshot displays the Deltek Costpoint user interface. The top navigation bar includes the Deltek Costpoint logo and menu items: FILE, LINE, OPTIONS, PROCESS, HELP. The main window shows the 'Manage Engineering Change Notices' application. A purple callout box highlights the 'Application Preferences' dialog box, which is open over the application. The dialog box contains the following settings:

- Company Name: USA, Co.
- System: [Redacted]
- Validation Frequency: Field
- Application Preferences for 'Manage Engineering Change Notices':
 - Application Layout Changes: Save | Reset
 - Global Toolbar Icon Options: Edit | Reset
- Color theme: Light Auto Dark
- Auto Positioning On:
Auto Positioning resizes applications to fully utilize screen space.
- Manage User Profiles: (Warning: Close all applications to enter User Profiles.)
- Buttons: View Applications, Close Applications, Cancel
- Footer: Manage "My Menu" in "Configure User Preferences"

The background application window shows a table titled 'Parts Impacted' with columns: Line, Action Code, Original Part, Original Part Rev, Original Part Description, Original Part Status, and Original Part Active. The table has a search bar and navigation controls. Below the table are various tabs: Part Documents, MBOM Components, MBOM Orig Assy, MBOM Chng Assy, EBOM Components, EBOM Orig Assy, EBOM Chng Assy, and Routings.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



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Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

USA, Co.

Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

Manage Engineering Change Notices

ECN ID Description

Application Preferences

Company Name: USA, Co.
System: [redacted]
Validation Frequency: Field

Application Layout Changes Save | Reset

Global toolbar icon Options Edit | Reset

Color theme: Light Auto Dark

Auto Positioning On
Auto Positioning resizes applications to fully utilize screen space.

Manage User Profiles

⚠ Close all applications to enter User Profiles.

View Applications Close Applications Cancel

Manage "My Menu" in "Configure User Preferences"

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

Original Part Description Original Part Status Original Part Active

Line Code Part Part Rev

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

Click **Save** on the **Application Layout Changes** area if you want to retain the current layout of the application that is open.

For example, you might want a specific subtask to automatically display every time you access a particular application. You can also save the order of the columns for a particular table. Click **Reset** to revert to the default settings for the application.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

The screenshot displays the Deltek Costpoint user interface. The top navigation bar includes the Deltek Costpoint logo and menu items: FILE, LINE, OPTIONS, PROCESS, HELP. The main content area is titled 'Manage Engineering Change Notices' and contains a form with fields for ECN ID, Description, Type, Date, Status, and Originator. A purple callout box is overlaid on the form, containing the text: 'Click Edit on the Global Toolbar Icon Options area to open the Save Toolbar Configuration dialog box.' The 'Global Toolbar Icon Options' dialog box is open, showing options for 'Application Layout Changes' and 'Global Toolbar Icon Options'. The 'Global Toolbar Icon Options' section is highlighted with an orange box. The dialog box also includes options for 'Color theme' (Light, Auto, Dark), 'Auto Positioning On' (checked), and 'Manage User Profiles'. The bottom of the screen shows a 'Parts Impacted' table with columns for Line, Action Code, Original Part, Original Part Rev, Original Part Description, Original Part Status, and Original Part Active.

Line	Action Code	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part Active

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

Use the Save Toolbar Configuration dialog box to configure the default toolbar settings.

- Select from the **Available** buttons list and click **Add** to move them to the **Selected** buttons list.
- Click the up and down arrows to set the order of the display.
- Click **Save** to save your changes.

These buttons display on the toolbar for the current application.

Save Toolbar Configuration

Show Toolbar Buttons with Labels Apply Configuration for Current Application Only.

Search Available

Available (0)		Selected (17)		
Name	Add	Name	Order	Remove
		Save	↓	×
		Save & Continue	↑ ↓	×
		Refresh	↑ ↓	×
		Clone	↑ ↓	×
		Lookup	↑ ↓	×
		Default Action	↑ ↓	×
		Actions/Reports	↑ ↓	×
		Execute	↑ ↓	×
		Page Setup	↑ ↓	×

Save Close

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

USA, Co.

Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

Manage Engineering Change Notices

Identification

ECN ID

Description

Basic Info Details Custom

Type

Date 10/02/20

Status Pending

Approval Process

Revision

Originator

Employee

Name

Organization

Phone

Impacted Projects Approvals General Notes Technical Notes

Parts Impacted

Line	Action Code	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part Active

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

Company Name: USA, Co.

System:

Validation Frequency: Field

Application Preferences

Manage Engineering Change Notices

Application Layout Changes Save Reset

Global Toolbar Icon Options Edit Reset

Color theme: Light Auto Dark

Auto Positioning On

Auto Positioning resizes applications to fully utilize screen space.

Manage User Profiles

Close all applications to enter User Profiles.

View Applications Close Applications Cancel

Manage "My Menu" in "Configure User Preferences"

Use Color theme to set your view in Light or Dark mode.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

The **Auto Positioning** feature, which automatically resizes screens based on the available space, is always turned on in the new user interface.

Note:
Depending on your license, this feature may not be available for you.

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Materials > Engineering Change Notices > Engineering Change Processing > Manage Engineering Change Notices

Manage Engineering Change Notices

Identification

ECN ID

Description

Basic Info

Type *

Date *

Status *

Originator

Employee

Organization

Parts Impacted

Line

Action Code *

Original Part

Original Part Rev

Original Part Description

Original Part Status

Original Part Active

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

Company Name: USA, Co.

System: [Redacted]

Validation Frequency: Field

Application Preferences

Manage Engineering Change Notices

Application Layout Changes Save | Reset

Global Toolbar Icon Options Edit | Reset

Color theme: Light Auto Dark

Auto Positioning On

Auto Positioning resizes applications to fully utilize screen space.

Manage User Profiles

Close all applications to enter User Profiles.

View Applications Close Applications Cancel

Manage "My Menu" in "Configure User Preferences"

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

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Configure User Preferences



Others

The screenshot displays the Deltek Costpoint user interface. The top navigation bar includes the Deltek Costpoint logo and menu items: FILE, LINE, OPTIONS, PROCESS, and HELP. The main content area shows the 'Manage Engineering Change Notices' screen, which is currently displaying the 'Basic Info' tab. A purple callout box is overlaid on the screen, containing the following text:

Use the **Manage User Profiles** area to customize user profiles.

A user profile is a collection of screen and functional logic customizations that can be assigned to users or user groups to provide custom user capabilities.

You can only manage user profiles if all applications are closed. Click the **Close Applications** button to do this.

The 'Application Preferences' dialog box is open, showing the 'Manage Engineering Change Notices' section. The 'Manage User Profiles' section is highlighted with an orange border, and the 'Close Applications' button is also highlighted with an orange border. The dialog box includes the following information:

- Company Name: USA, Co.
- System: [Redacted]
- Validation Frequency: Field
- Application Layout Changes: Save | Reset
- Global Toolbar Icon Options: Edit | Reset
- Color theme: Light Auto Dark
- Auto Positioning On: (Auto Positioning resizes applications to fully utilize screen space.)
- Manage User Profiles: (Close all applications to enter User Profiles.)
- Buttons: View Applications, Close Applications, Cancel
- Footer: Manage "My Menu" in "Configure User Preferences"

The bottom of the screenshot shows a table with columns: Original Part Description, Original Part Status, and Original Part Active. The table is currently empty.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

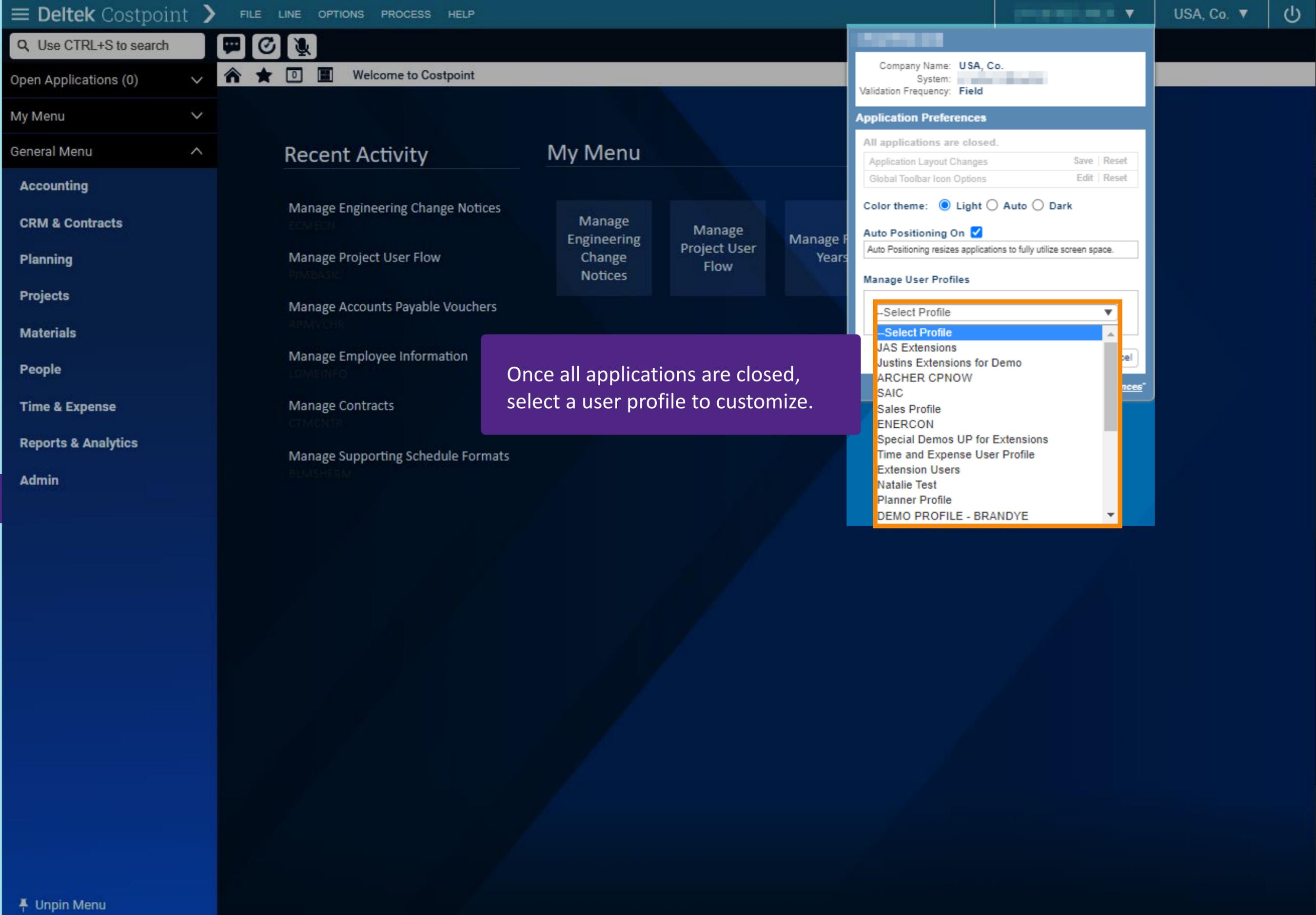
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Once all applications are closed, select a user profile to customize.

Company Name: USA, Co.
System: [blurred]
Validation Frequency: Field

Application Preferences

All applications are closed.

Application Layout Changes	Save	Reset
Global Toolbar Icon Options	Edit	Reset

Color theme: Light Auto Dark

Auto Positioning On
Auto Positioning resizes applications to fully utilize screen space.

Manage User Profiles

--Select Profile

- Select Profile
- JAS Extensions
- Justins Extensions for Demo
- ARCHER CPNOW
- SAIC
- Sales Profile
- ENERCON
- Special Demos UP for Extensions
- Time and Expense User Profile
- Extension Users
- Natalie Test
- Planner Profile
- DEMO PROFILE - BRANDYE

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

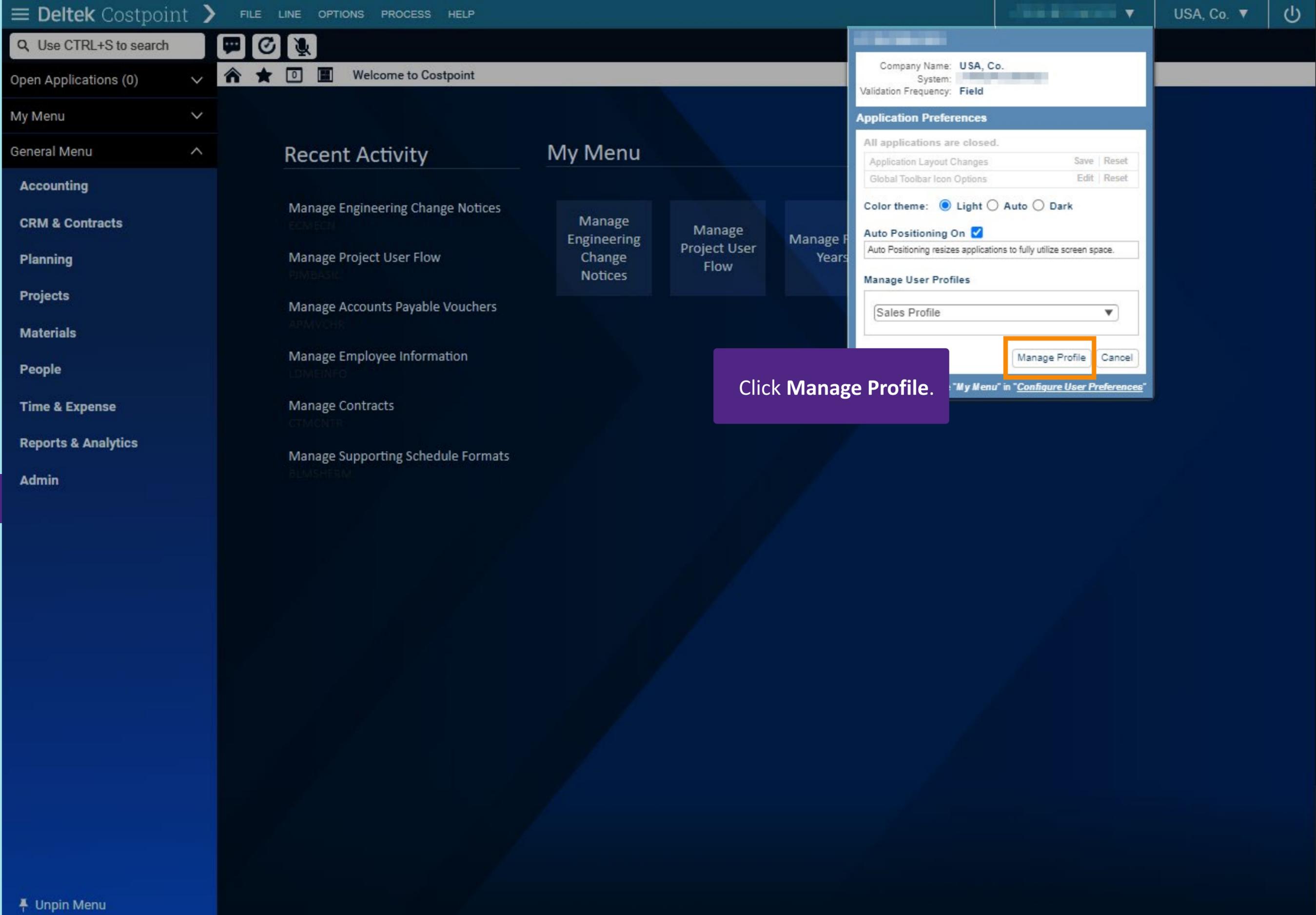
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Click Manage Profile.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

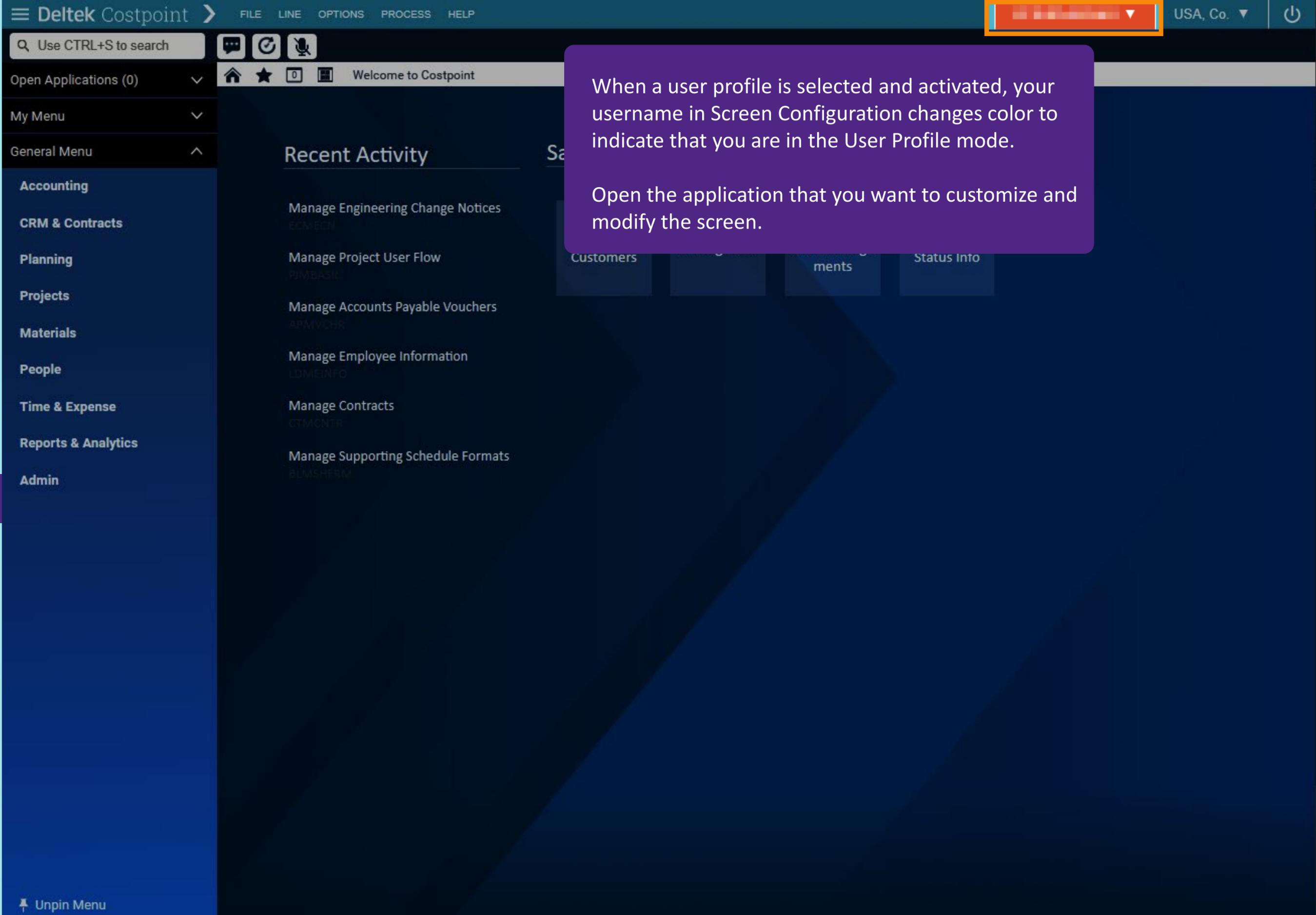
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



When a user profile is selected and activated, your username in Screen Configuration changes color to indicate that you are in the User Profile mode.

Open the application that you want to customize and modify the screen.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

USA, Co.

Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Company Name: USA, Co.
System: [redacted]
Validation Frequency: Field

Application Preferences

Manage Engineering Change Notices

Application Layout Changes Save | Reset

Global Toolbar Icon Options Edit | Reset

Mobile Configuration Edit | Reset

Color theme: Light Auto Dark

Auto Positioning On
Auto Positioning resizes applications to fully utilize screen space.

Current User Profile Close all applications to exit User Profile

Sales Profile

View Applications Close Applications Cancel

Manage "Profile My Menu" in "Manage User Interface Profiles"

Click your username again to display the Screen Configuration window. Then, click **Save** beside the **Application Layout Changes** area to save your customization.

Click **Close Applications** to exit the user profile.

Parts Impacted

Line	Action Code *	Original Part	Original Part Rev	Original Part Description	Original Part Status	Original Part Active

Part Documents MBOM Components MBOM Orig Assy MBOM Chng Assy EBOM Components EBOM Orig Assy EBOM Chng Assy Routings

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

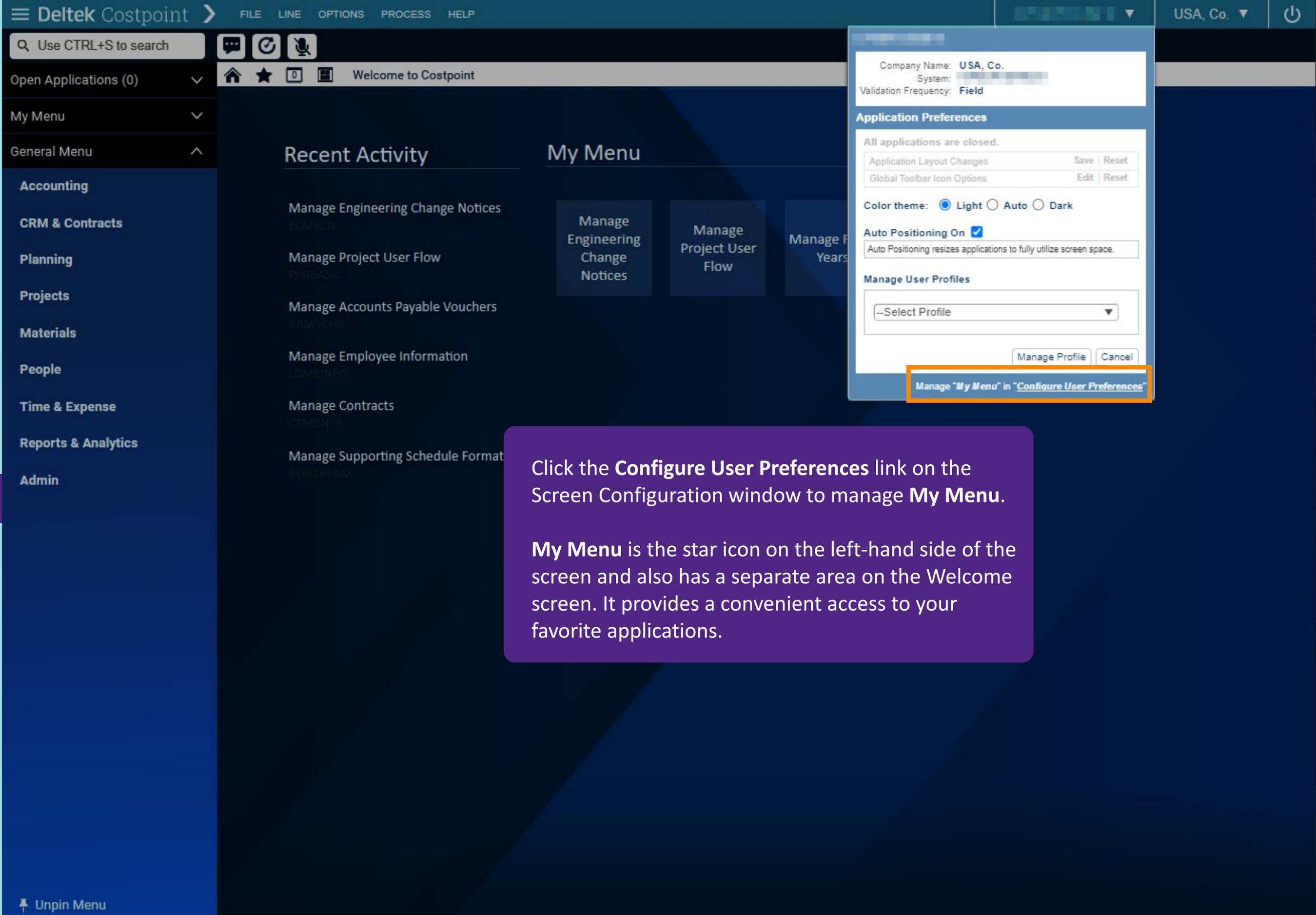
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Click the **Configure User Preferences** link on the Screen Configuration window to manage **My Menu**.

My Menu is the star icon on the left-hand side of the screen and also has a separate area on the Welcome screen. It provides a convenient access to your favorite applications.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

The screenshot shows the 'Configure User Preferences' interface in Deltek Costpoint. The breadcrumb trail is: Admin > System Administration > System Administration Controls > Configure User Preferences. The page title is 'Configure User Preferences' with '1 of 1 Existing' records. The form includes fields for User ID, User Name, and sections for User Information, Default Information, Default Report Delivery Options, Phone, Password Information, and Delegate Approvals. A purple callout box contains the following text:

On the Configure User Preferences screen, use the table windows to select the applications that you want to include in **My Menu**.

The **My Menu Application List** displays the applications that your role can access, and **My Menu** displays your frequently used applications. You can customize the **My Menu** list to include your favorite applications and minimize time spent navigating through the entire Costpoint menu.

At the bottom, two tables are shown:

Application	Name	Domain
ADMCHGTREE	Charge Trees	Time & Expense
ADMDESKTOP	MyDesktop	Time & Expense
ADMEMAILTEXT	E-mail Text	Time & Expense
ADMEMPLGRP	Resource Groups	Time & Expense
ADMEMPLINFO	Resource Information	Time & Expense
ADMEMPLPREF	Profile	Time & Expense

Sequence	Line Type *	My Menu Title *	Create Nav Banner?	App
10	Application	Manage Engineering Change Notices	<input type="checkbox"/>	ECMEC
20	Application	Manage Project User Flow	<input type="checkbox"/>	PJMBA
30	Application	Manage Fiscal Years	<input type="checkbox"/>	GLMFV

Costpoint User Interface

Navigation



Global Menu



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Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences



Others

To make a selection on the **My Menu Application List**, highlight the application and click **Select**.

The **My Menu** fields display information for each application and their location within Costpoint. Select these options to configure the order and type of menus that display in your application.

Click **Default My Menu** to open the default menu subtask. Click **Save**.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

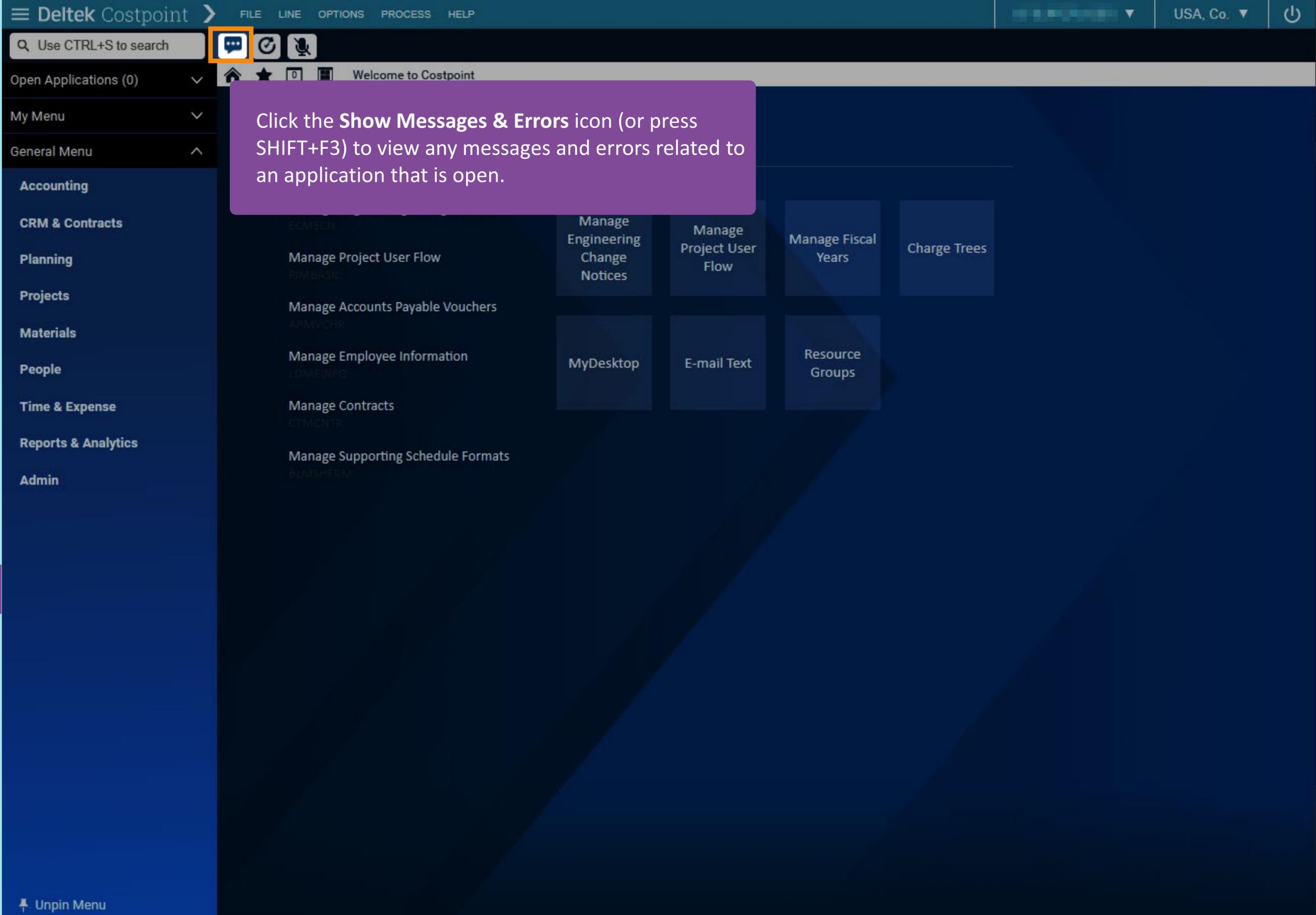
Show Messages & Errors

View Action and Report Status

Hey Deltek!

Select Company

Logout



Click the **Show Messages & Errors** icon (or press SHIFT+F3) to view any messages and errors related to an application that is open.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

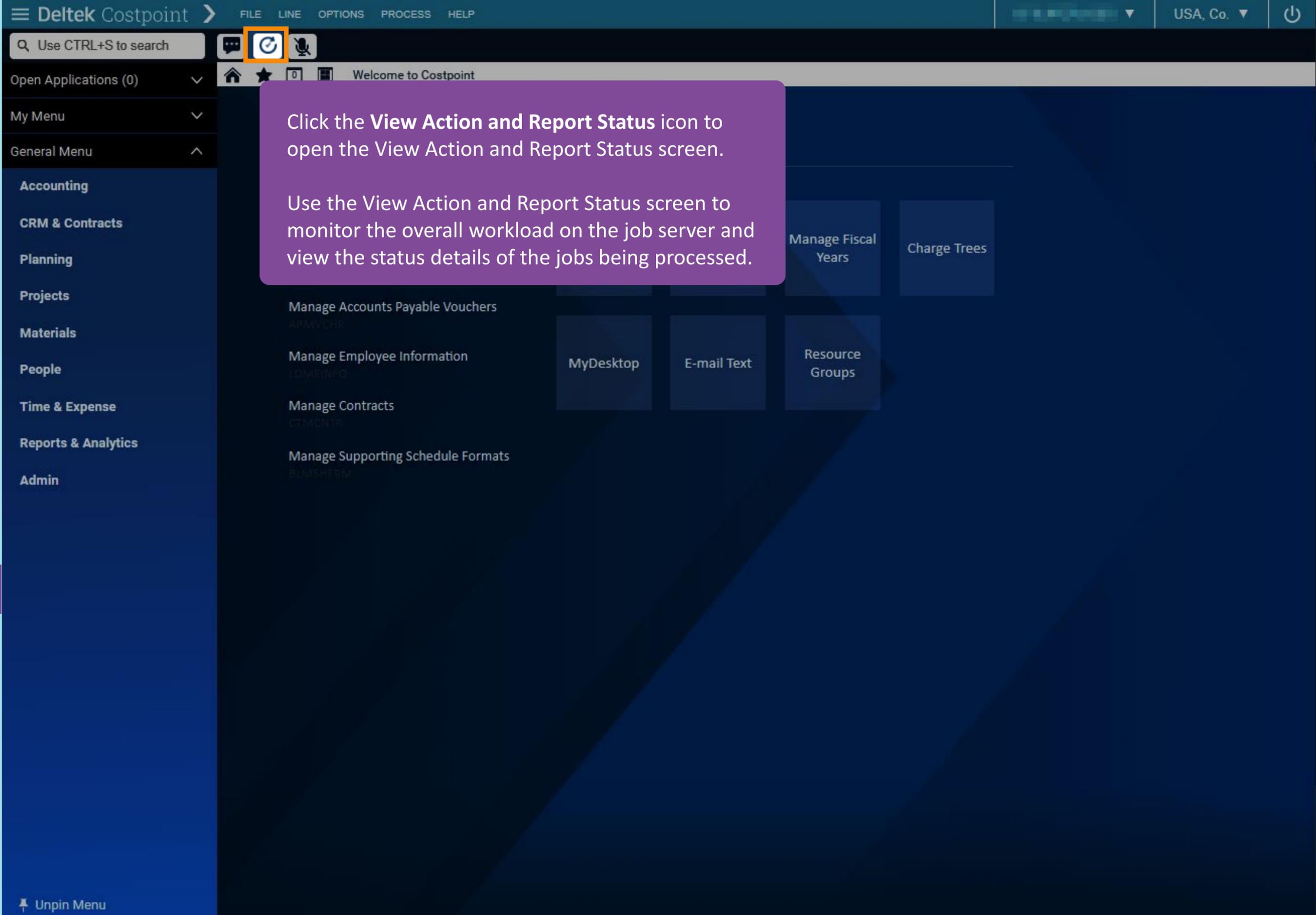
Show Messages & Errors

View Action and Report Status

Hey Deltek!

Select Company

Logout



Click the **View Action and Report Status** icon to open the View Action and Report Status screen.

Use the View Action and Report Status screen to monitor the overall workload on the job server and view the status details of the jobs being processed.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Show Messages & Errors

View Action and
Report Status

Hey Deltek!

Select Company

Logout

The screenshot shows the Deltek Costpoint user interface. At the top, there is a navigation bar with the Deltek Costpoint logo and menu items: FILE, LINE, OPTIONS, PROCESS, HELP. Below the navigation bar is a search bar with the text "Use CTRL+S to search". To the right of the search bar are several icons, including a microphone icon which is highlighted with a red box. Below the search bar is a "Welcome to Costpoint" message. The main content area is divided into a left sidebar menu and a main content area. The sidebar menu includes sections for Accounting, CRM & Contracts, Planning, Projects, Materials, People, Time & Expense, Reports & Analytics, and Admin. The main content area displays a grid of application tiles, including "Manage Accounts Payable Vouchers", "Manage Employee Information", "Manage Contracts", "Manage Supporting Schedule Formats", "MyDesktop", "E-mail Text", "Resource Groups", "Manage Fiscal Years", and "Charge Trees". A purple callout box is overlaid on the screenshot, containing the text: "Click the **Voice** icon to enable Hey Deltek! Hey Deltek! is a virtual personal assistant that helps you enter and manage data by listening to your voice and performing a task you tell it to do."

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Show Messages & Errors

View Action and Report Status

Hey Deltek!

Select Company

Logout

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

Q Use CTRL+S to search

Open Applications (0)

My Menu

General Menu

Welcome to Costpoint

USA, Co.

Recent Activity

My Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Manage Engineering Change Notices

Manage Project User Flow

Manage Accounts Payable Vouchers

Manage Employee Information

Manage Contracts

Manage Supporting Schedule Formats

Manage Engineering Change Notices

MyDesktop

E-mail Text

Resource Groups

Unpin Menu

Note: Depending on your license, the multicompany feature may not be available for you.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

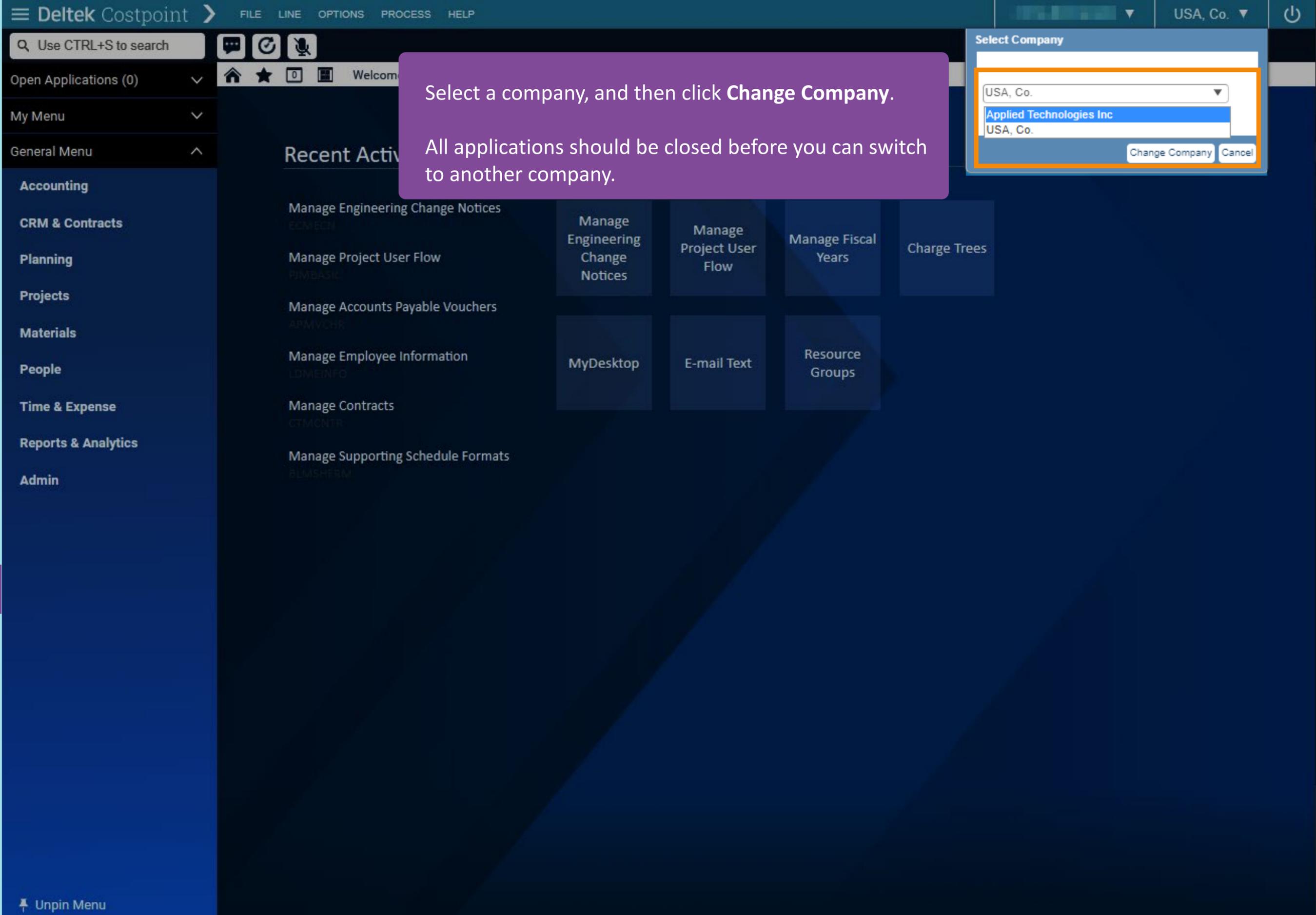
Show Messages & Errors

View Action and Report Status

Hey Deltek!

Select Company

Logout



Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Show Messages & Errors

View Action and Report Status

Hey Deltek!

Select Company

Logout

Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

Applied Technologies Inc

Use CTRL+S to search

Open Applications (0)

My Menu

General Menu

Recent Activity

My Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Manage Engineering Change Notices

Manage Project User Flow

Manage Accounts Payable Vouchers

Manage Employee Information

Manage Contracts

Manage Supporting Schedule Formats

Timesheet

Business Intelligence

Manager

Manage Users

Manage Documents

Release Documents

Manage Parts

Cash Receipts CMI

View Receivables and Collections

Vendor CMI

Manage Contract Management Vendor Info

Approve Prospective Vendors

Manage Vendors

Unpin Menu

Once you switch to another company, the company name displays on top of the screen.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Show Messages & Errors

View Action and Report Status

Hey Deltek!

Select Company

Logout

Click the **Logout** icon to sign out of Costpoint.

Costpoint® [Install](#)

USERNAME

PASSWORD
Enter a valid password

Remember me

[Log In](#)

[+ ADDITIONAL CRITERIA](#)

This concludes the Costpoint User Interface Quick Steps.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Show Messages & Errors

View Action and Report Status

Hey Deltek!

Select Company

Logout