

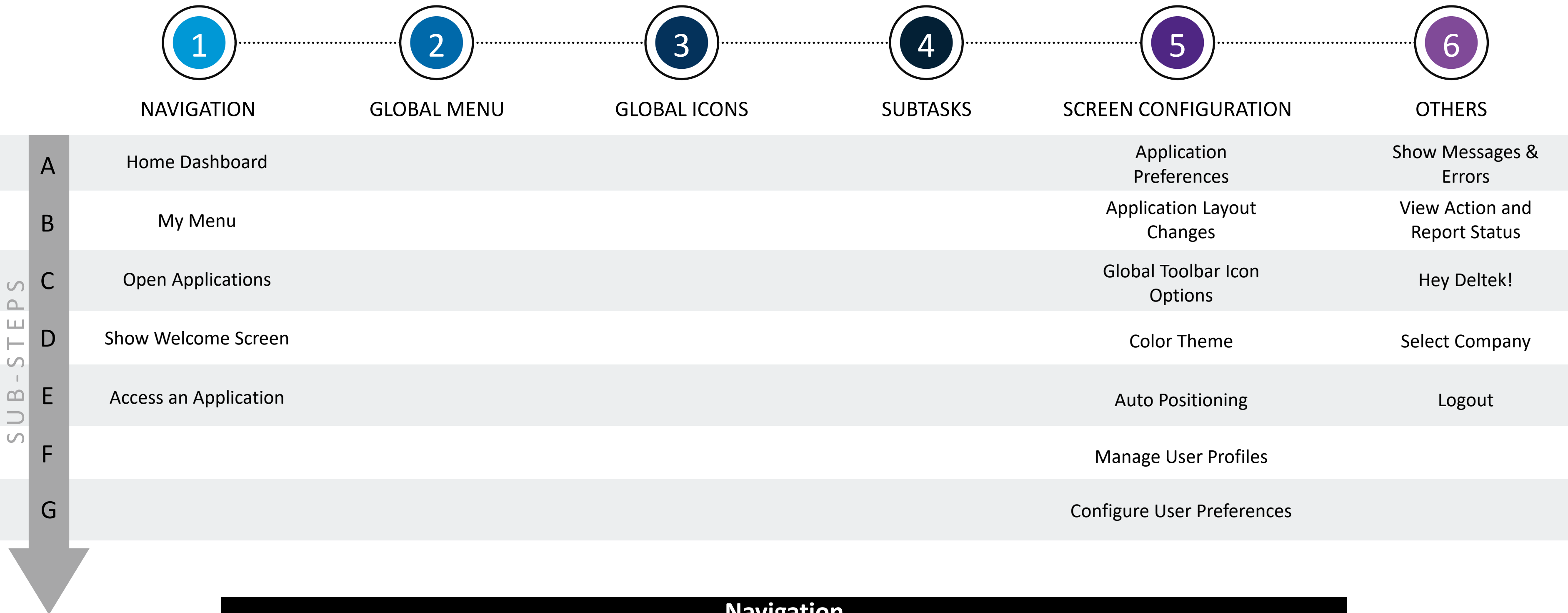
Deltek[®]

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

- 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

Deltek Costpoint

FILELINEOPTIONSPROCESSHELP

Use CTRL+S to search

Open Applications (0)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Home

Star

Calendar

Grid

Welcome to Costpoint

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

Manage Employee Information

LDMEINFO

Manage Contracts

CTMONTR

Manage Supporting Schedule Formats

BLMSHPRM

Create Revaluation Entry

GLP65REV

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



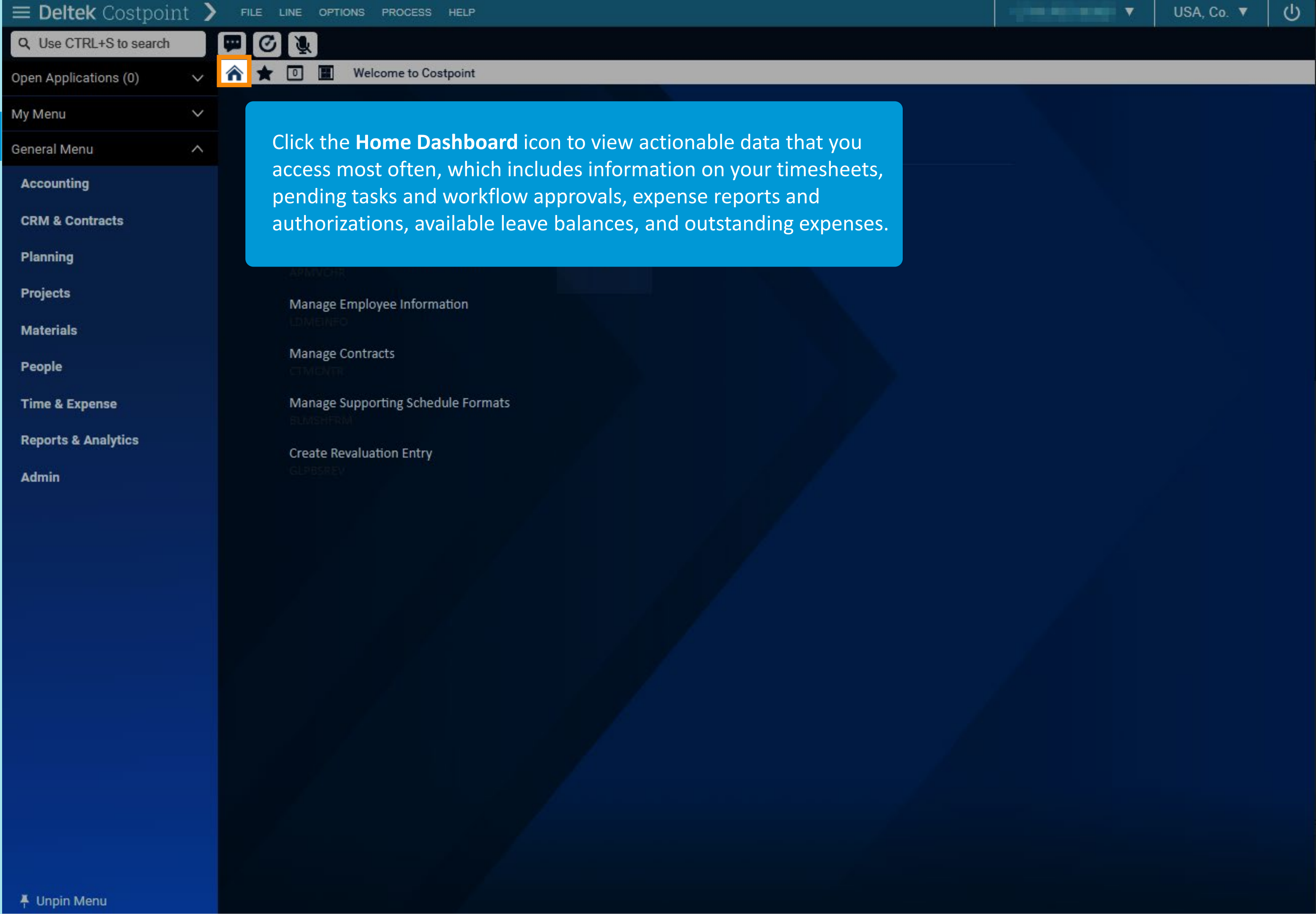
Subtasks



Screen Configuration



Others



Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



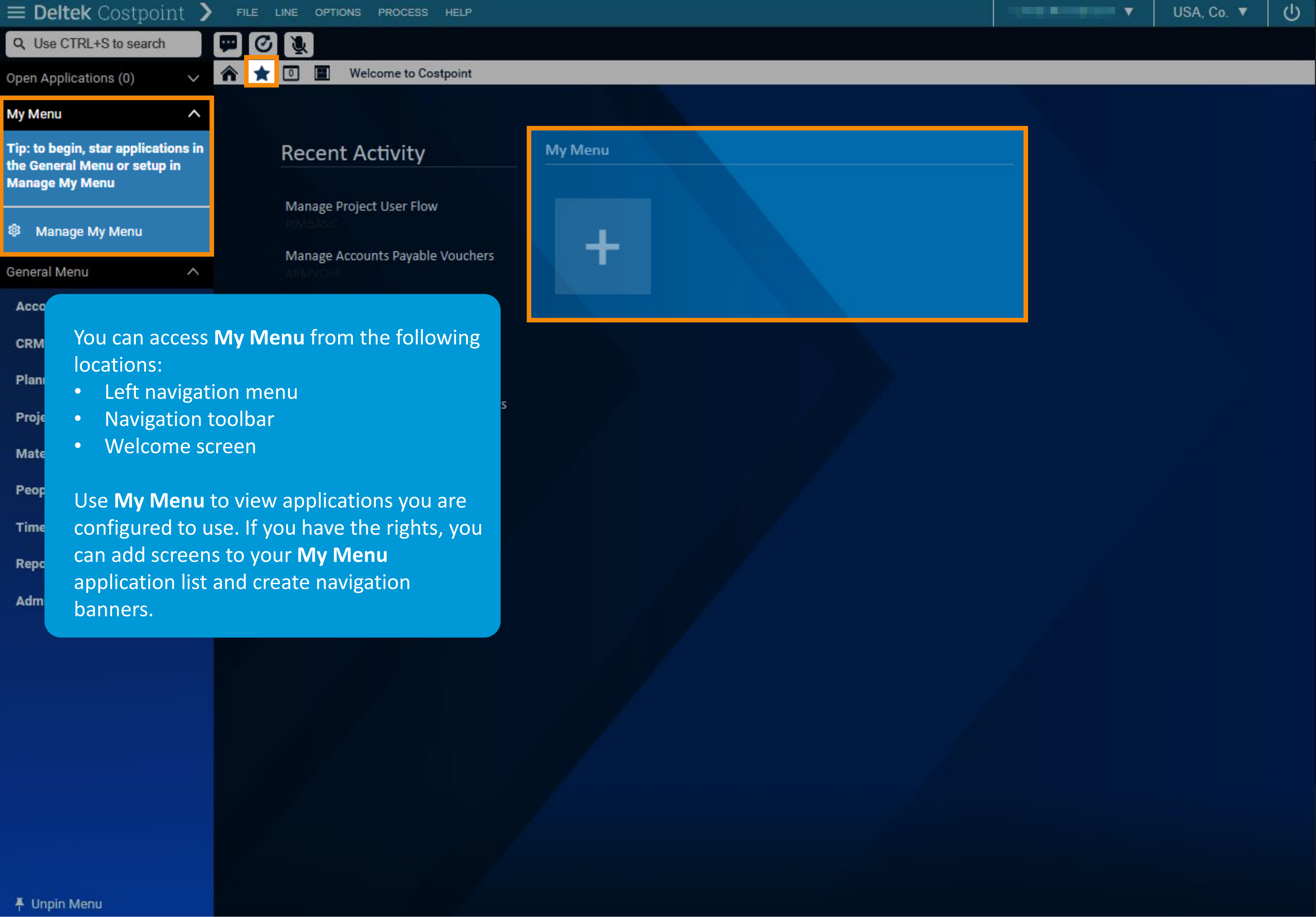
Subtasks



Screen Configuration



Others



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.

Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



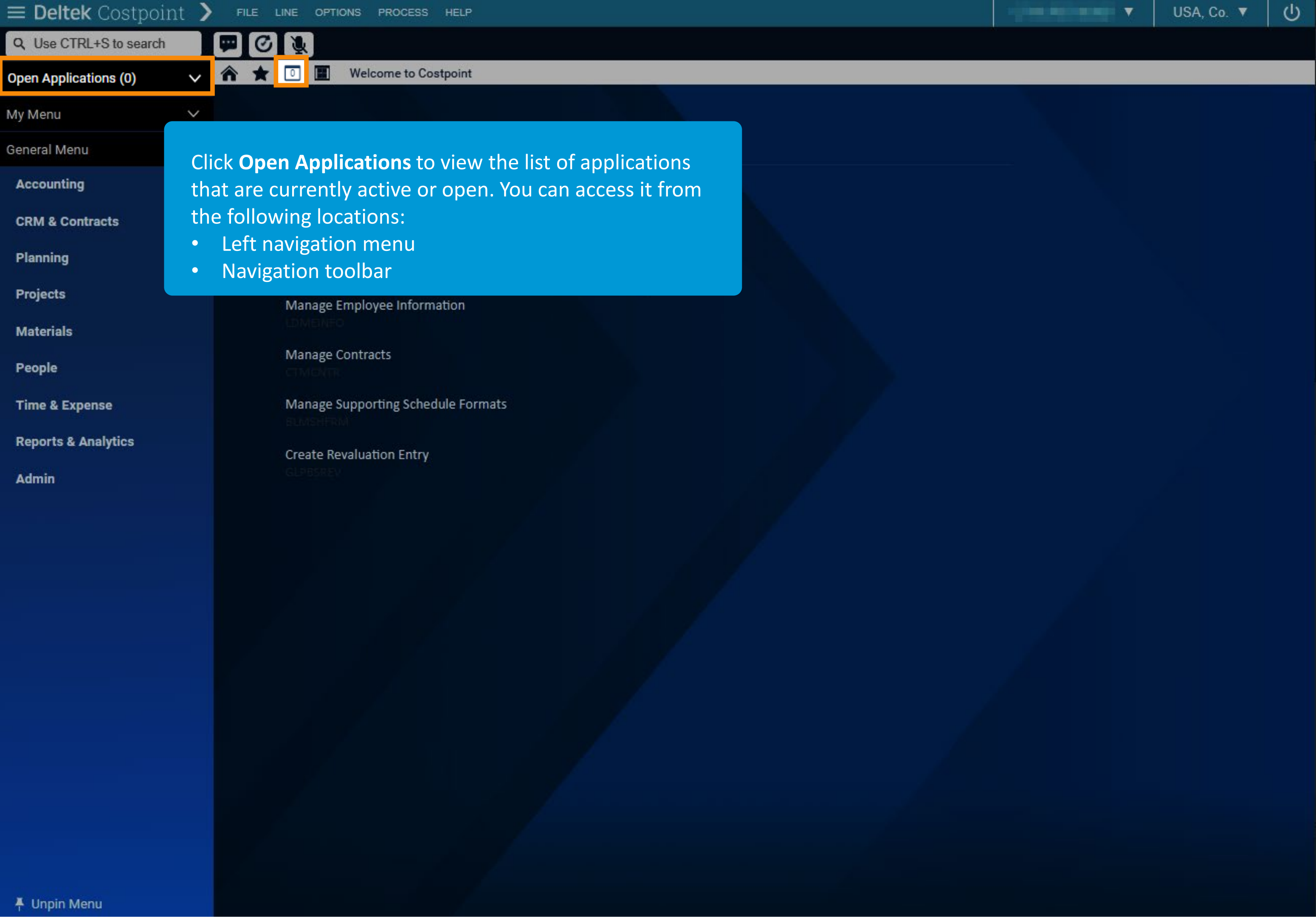
Subtasks



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



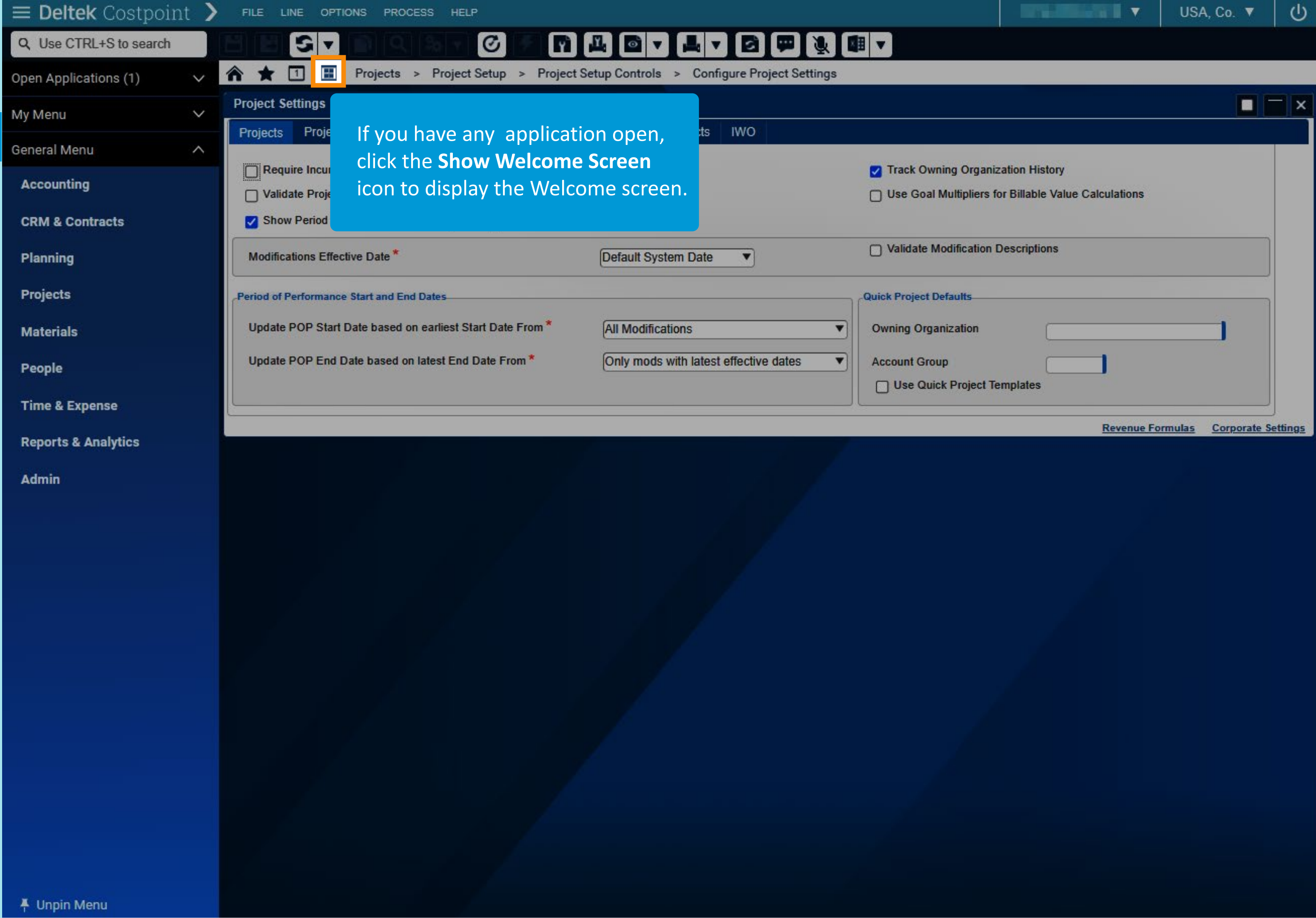
Subtasks



Screen Configuration



Others



Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



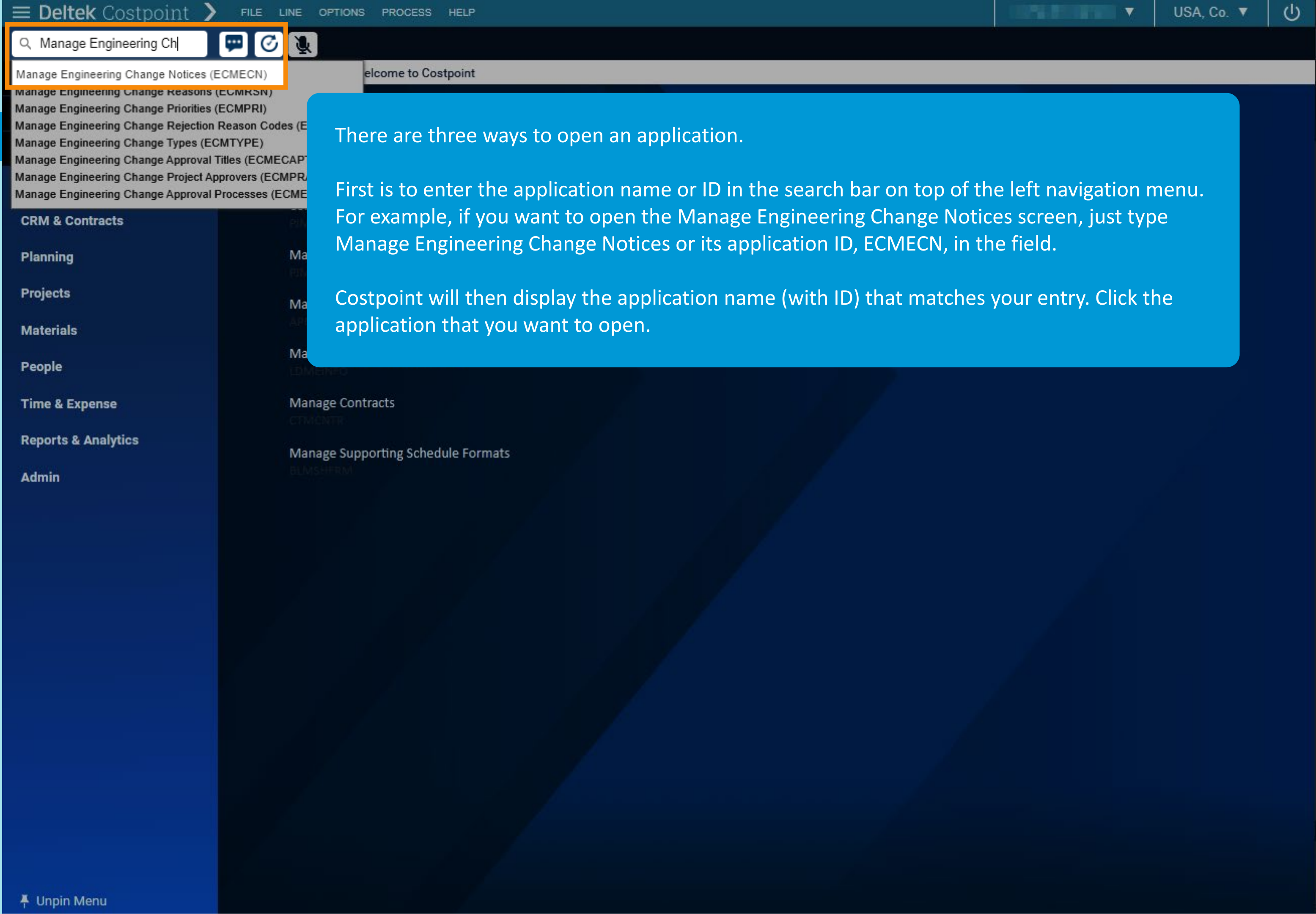
Subtasks



Screen Configuration



Others



Costpoint User Interface

Navigation

Home Dashboard

My Menu

Open Applications

Show Welcome Screen

Access an Application



Global Menu



Global Icons



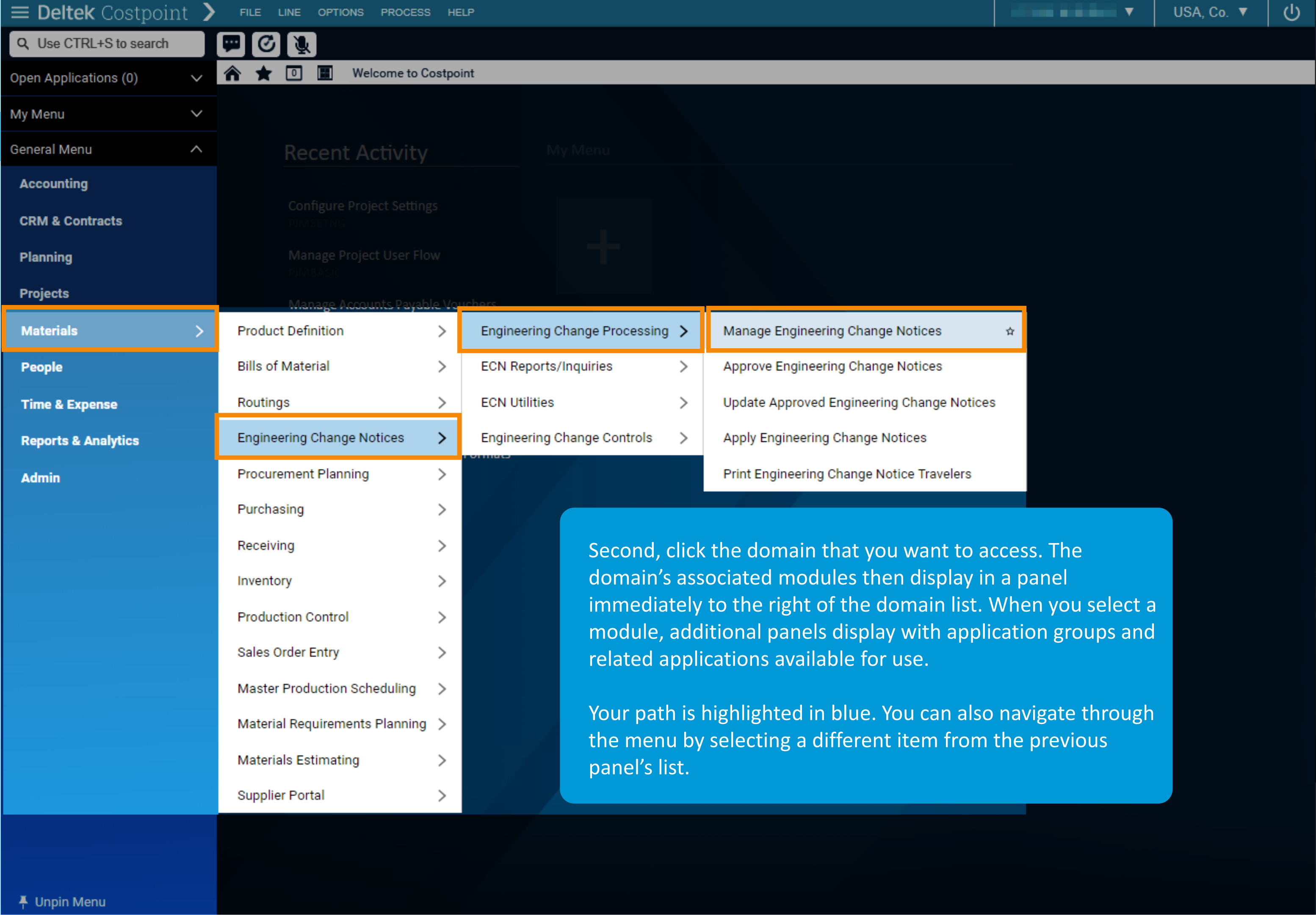
Subtasks



Screen Configuration



Others



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



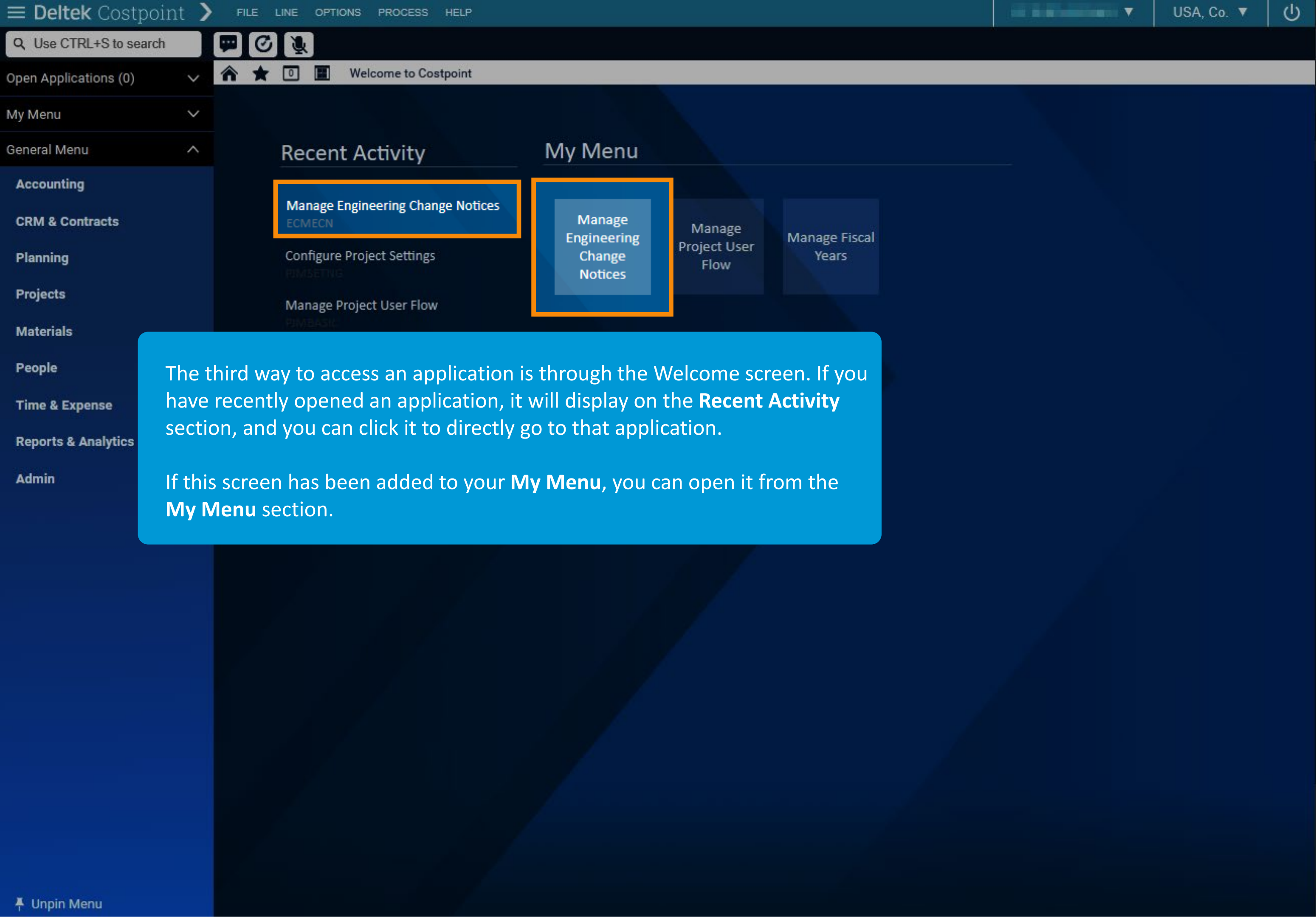
Subtasks



Screen Configuration



Others



Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

Deltek Costpoint

FILELINEOPTIONSPROCESSHELP

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

HomeStar1Ma

Manage Engineering C

Identification

ECN ID

Description

Basic InfoDetailsCustomer Information

Type

Date10/02/2023

StatusPending

Originator

Employee

Organization

Parts Impacted

Line

Action Code

Action Menu

Default Action

View Action and Report Status

File Upload

File Download

Engineering Change Processing > Manage Engineering Change Notices

NewCopyDelete1 of 1 NewTableFindQuery

Submit for Approval

DocumentsEC Impacted GroupsUser-Defined Info

NewCopyDeleteFormQuery

Original Part StatusOriginal Part Active

EBOM Orig AssyEBOM Chng AssyRoutings

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

The screenshot displays the Deltek Costpoint application interface. At the top, the 'Deltek Costpoint' logo is visible on the left, and the 'FILE LINE OPTIONS PROCESS HELP' menu is on the right. Below the logo is a search bar with the text 'Use CTRL+S to search'. The main navigation menu on the left includes sections like 'Open Applications (1)', 'My Menu', 'General Menu', and various functional areas such as 'Accounting', 'CRM & Contracts', 'Planning', 'Projects', 'Materials', 'People', 'Time & Expense', 'Reports & Analytics', and 'Admin'. The central part of the screen shows the 'Manage Engineering Change Notices' window. This window has a 'Basic Info' tab selected, displaying fields for 'ECN ID', 'Type', 'Date' (10/02/2023), 'Status' (Pending), 'Originator' (Employee and Organization), and 'Parts Impacted'. A table at the bottom lists various document types like 'Part Documents', 'MBOM Components', etc. A blue callout box with the text 'Use the global icons to maneuver around Costpoint applications.' points to a toolbar at the top of the application window. Another blue callout box with the text 'Global Icons' and '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.' is positioned over the 'Parts Impacted' table area.

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

Deltek Costpoint

FILELINEOPTIONSPROCESSHELP

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

ECN ID

Basic InfoDetail

Type *
Date *
Status *
Originator
Employee
Organization

Impacted ProjectsApprovalsGeneral NotesTechnical NotesImplementation NotesTextDocumentsEC Impacted GroupsUser-Defined Info

Parts Impacted

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

Part DocumentsMBOM ComponentsMBOM Orig AssyMBOM Chng AssyEBOM ComponentsEBOM Orig AssyEBOM Chng AssyRoutings

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

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CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

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 * Priority Submit for Approval

Date * Reason * Approval Process

Status * Pending

Originator

Employee Name * Organization Phone

Impacted Projects Approvals General Notes Technical Notes Implementation Notes Text Documents EC Impacted Groups New Defect Life Cycle

Parts Impacted

New Copy Delete Form Query

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

Unpin Menu

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

FILELINEOPTIONSPROCESSHELP

Q Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

Accounting

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Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Unpin Menu

Materials > Engineering Change Notices > Engineering

Manage Engineering Change Notices

Identification

ECN IDDescription

Basic InfoDetailsCustomer InformationCustomer Notes

Type *Class *PrioritySubmit for Approval

Date *Reason *Hold

Status *Approval ProcessRevision

Originator

EmployeeName *

OrganizationPhone

Impacted ProjectsApprovalsGeneral NotesTechnical NotesImplementation NotesTextDocumentsEC Impacted GroupsUser-Defined Info

Parts Impacted

Line

Action Code *

Original Part

Original Part Rev

Original Part Description

Original Part Status

Original Part Active

Part DocumentsMBOM ComponentsMBOM Orig AssyMBOM Chng AssyEBOM ComponentsEBOM Orig AssyEBOM Chng AssyRoutings

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

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Open Applications (1)

My Menu

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Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

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

ECN IDDescription

Parts Impacted

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

Part DocumentsMBOM ComponentsMBOM Orig AssyMBOM Chng AssyEBOM ComponentsEBOM Orig AssyEBOM Chng AssyRoutings

Company Name: USA, Co.

System:

Validation Frequency: Field

Application Preferences

Manage Engineering Change Notices

Application Layout Changes

Global Toolbar Icon Options

Color theme: LightAutoDark

Auto Positioning On

Manage User Profiles

View Applications

Close Applications

Cancel

Manage "My Menu" in "Configure User Preferences"

Unpin Menu

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

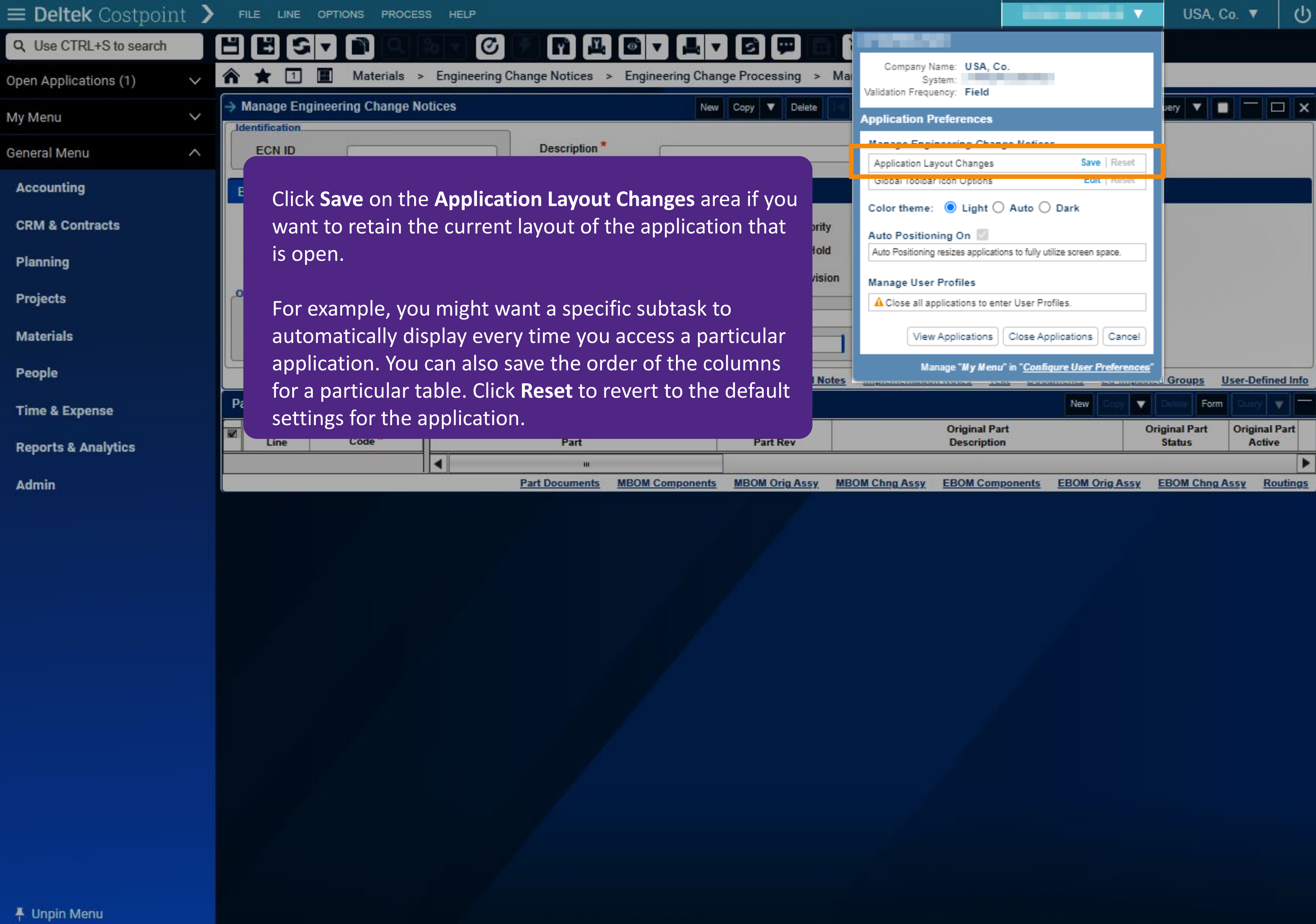
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

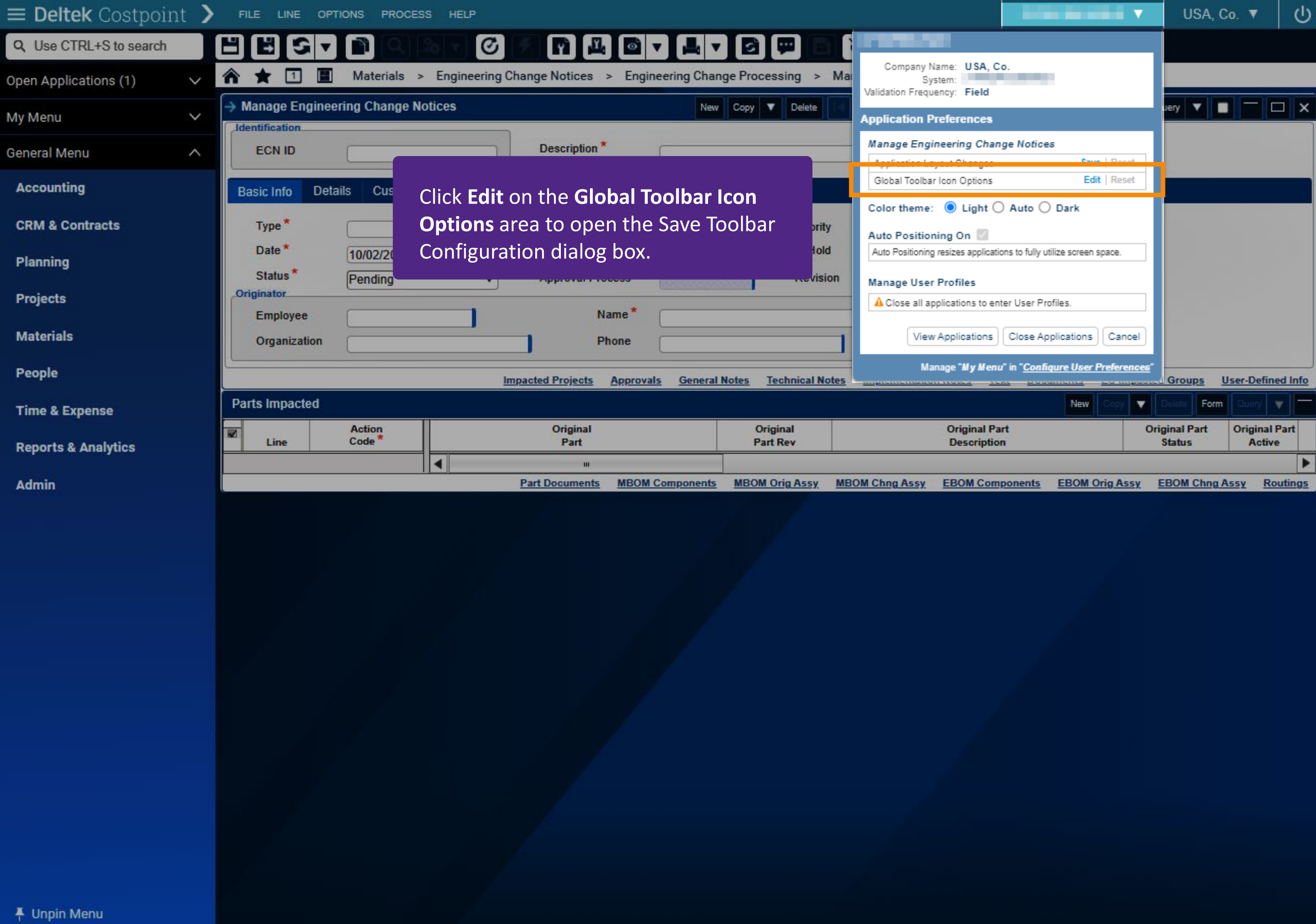
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Costpoint User Interface

Navigation



Global Menu



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Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

Auto Positioning

Manage User Profiles

Configure User Preferences

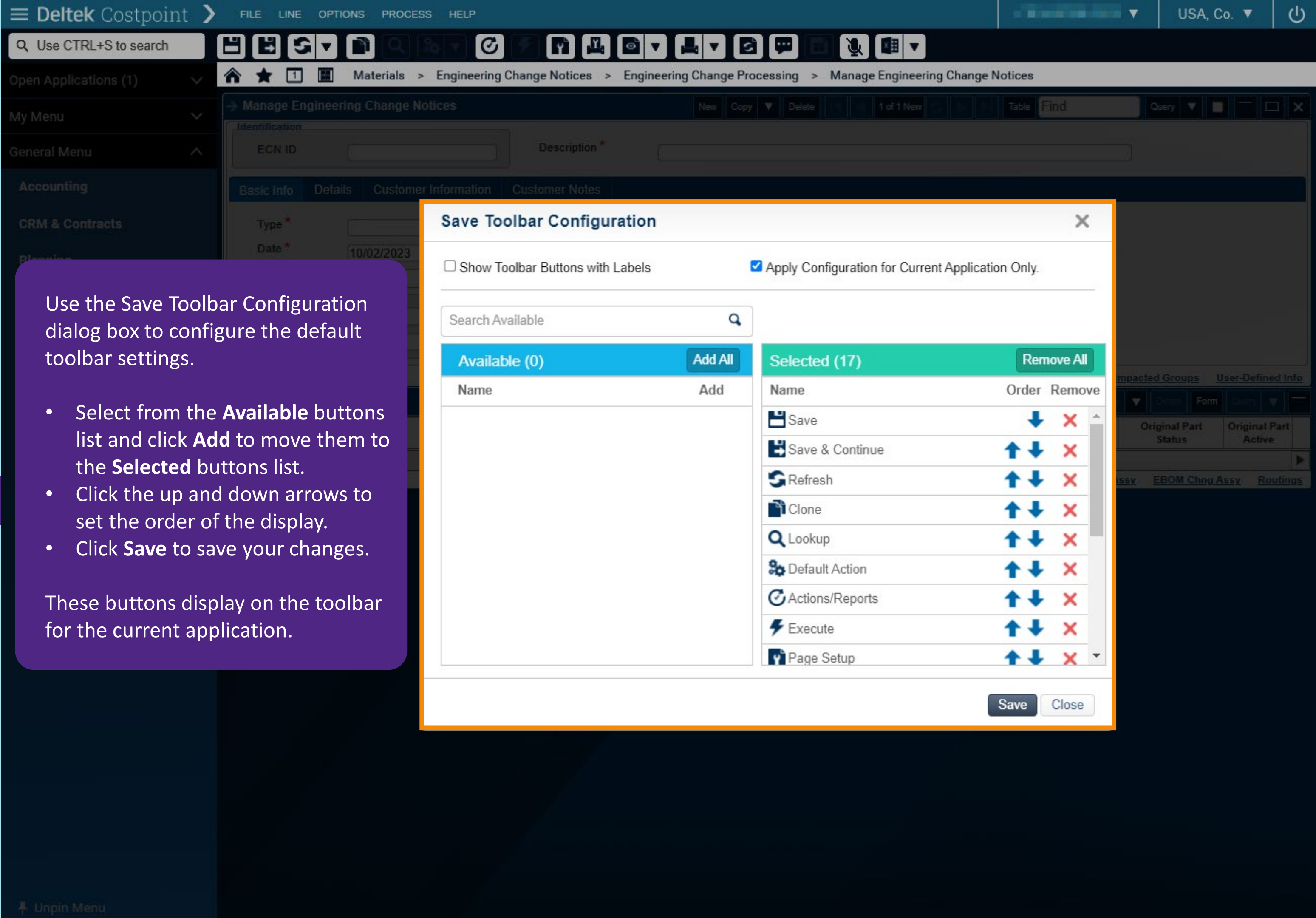


Others

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.



Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

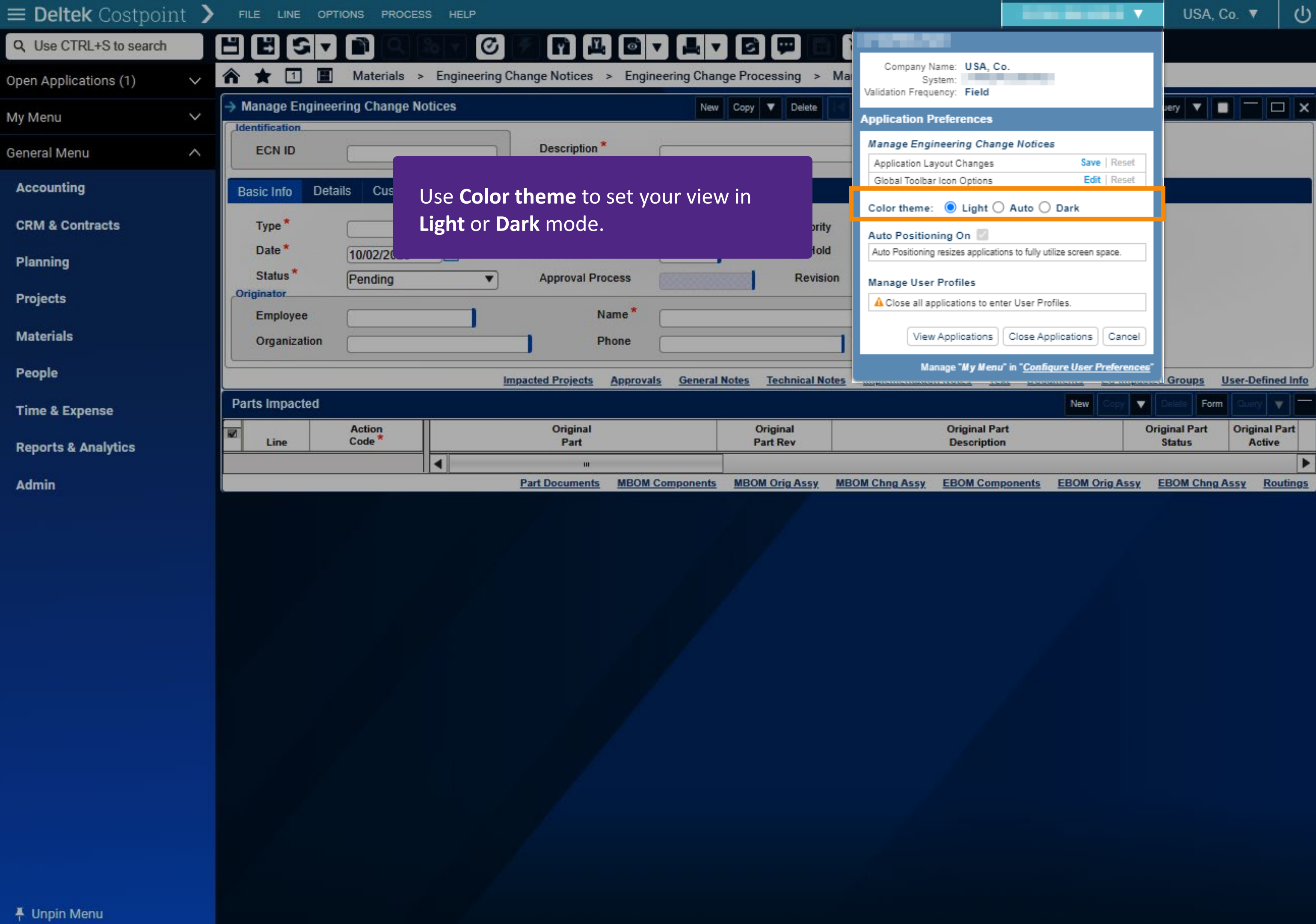
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Costpoint User Interface

Navigation



Global Menu



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Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

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Configure User Preferences



Others

Deltek Costpoint

FILELINEOPTIONSPROCESSHELP

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

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 DocumentsMBOM ComponentsMBOM Orig AssyMBOM Chng AssyEBOM ComponentsEBOM Orig AssyEBOM Chng AssyRoutings						

Company Name: USA, Co.

System:

Validation Frequency: Field

Application Preferences

Manage Engineering Change Notices

Application Layout Changes

Global Toolbar Icon Options

Color theme: LightAutoDark

Auto Positioning On

Auto Positioning resizes applications to fully utilize screen space.

Manage User Profiles

Close all applications to enter User Profiles.

View ApplicationsClose ApplicationsCancel

Manage "My Menu" in "Configure User Preferences"

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.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

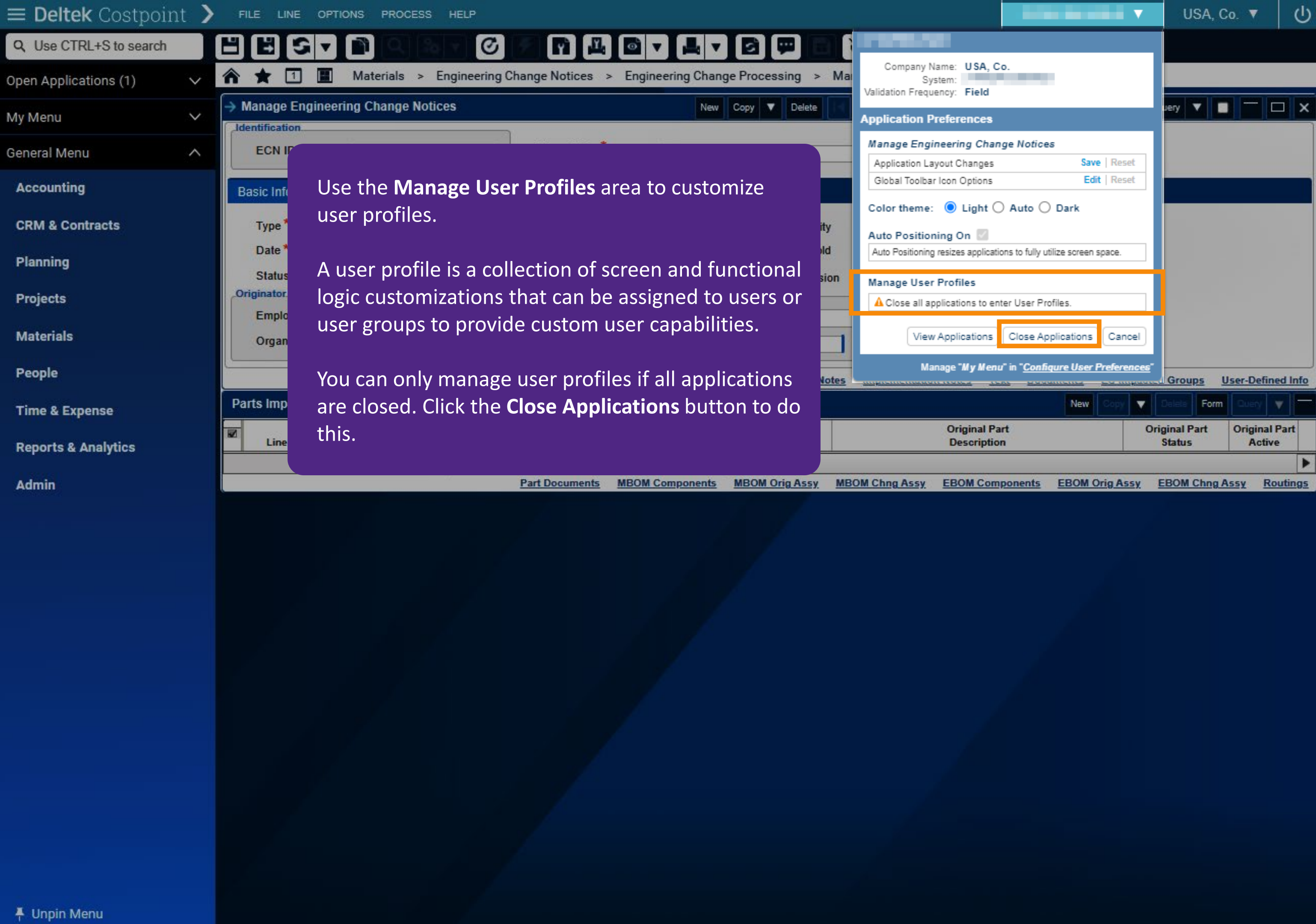
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Use the **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.

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

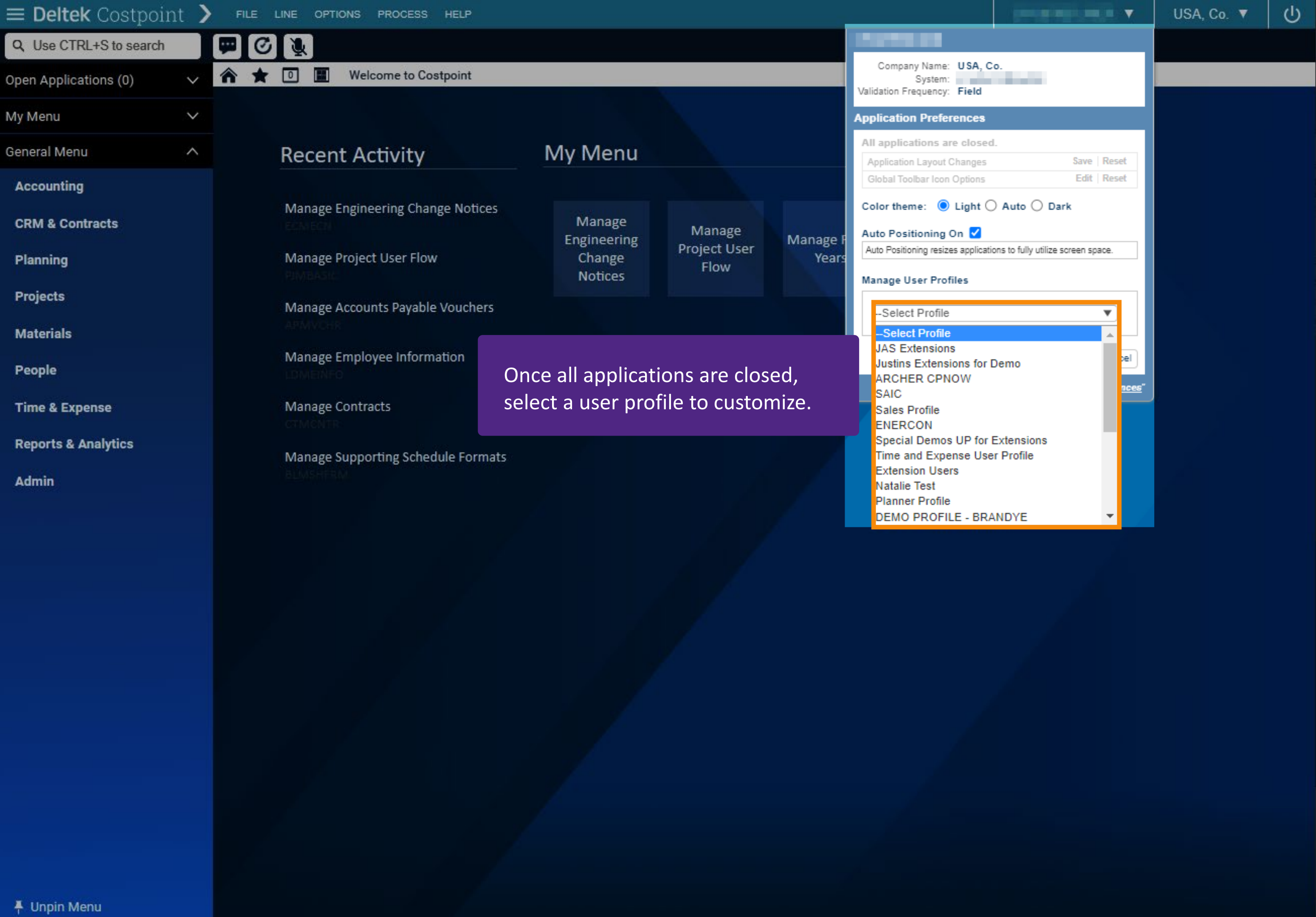
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

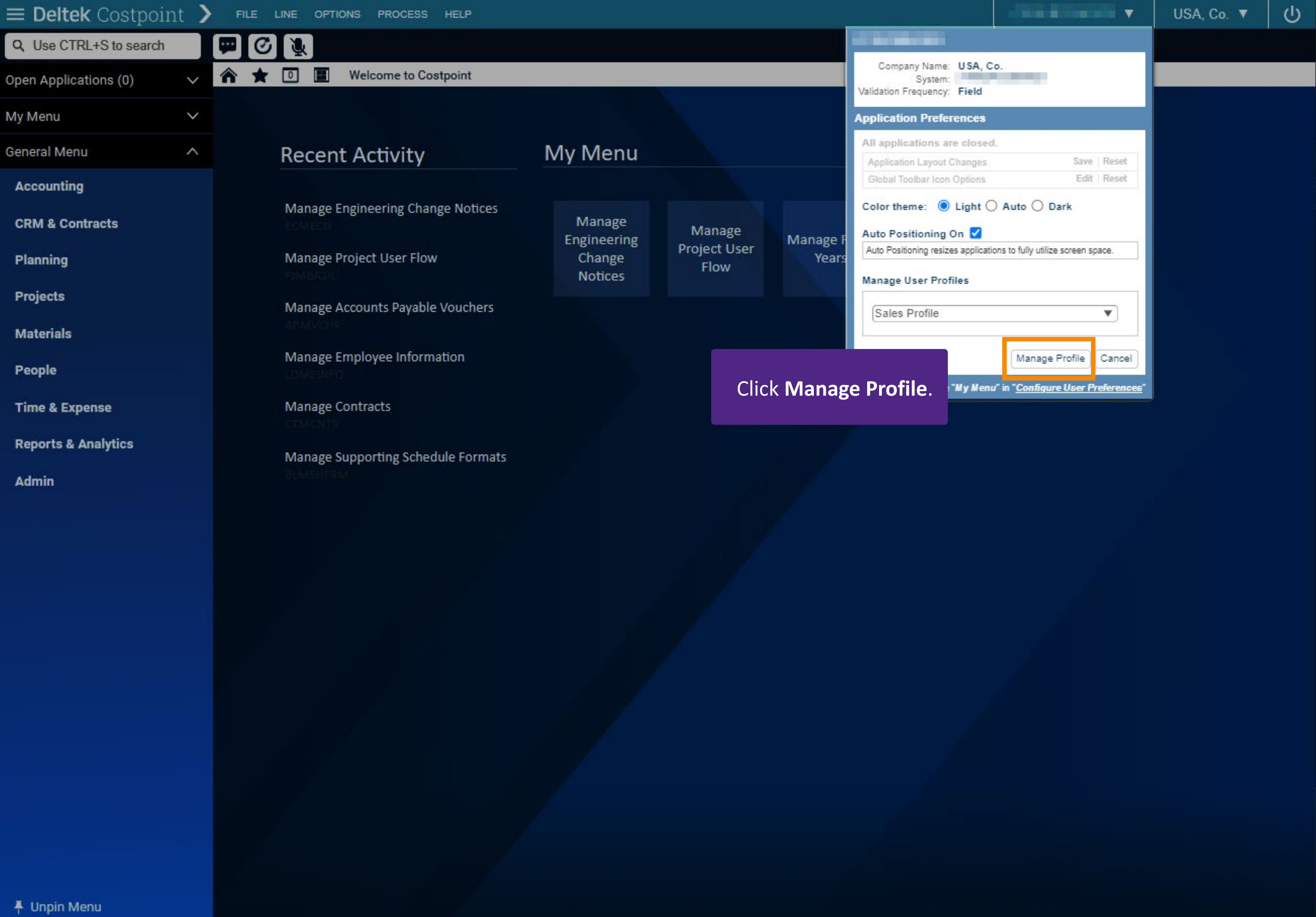
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Costpoint User Interface

Navigation



Global Menu



Global Icons



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Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

Color Theme

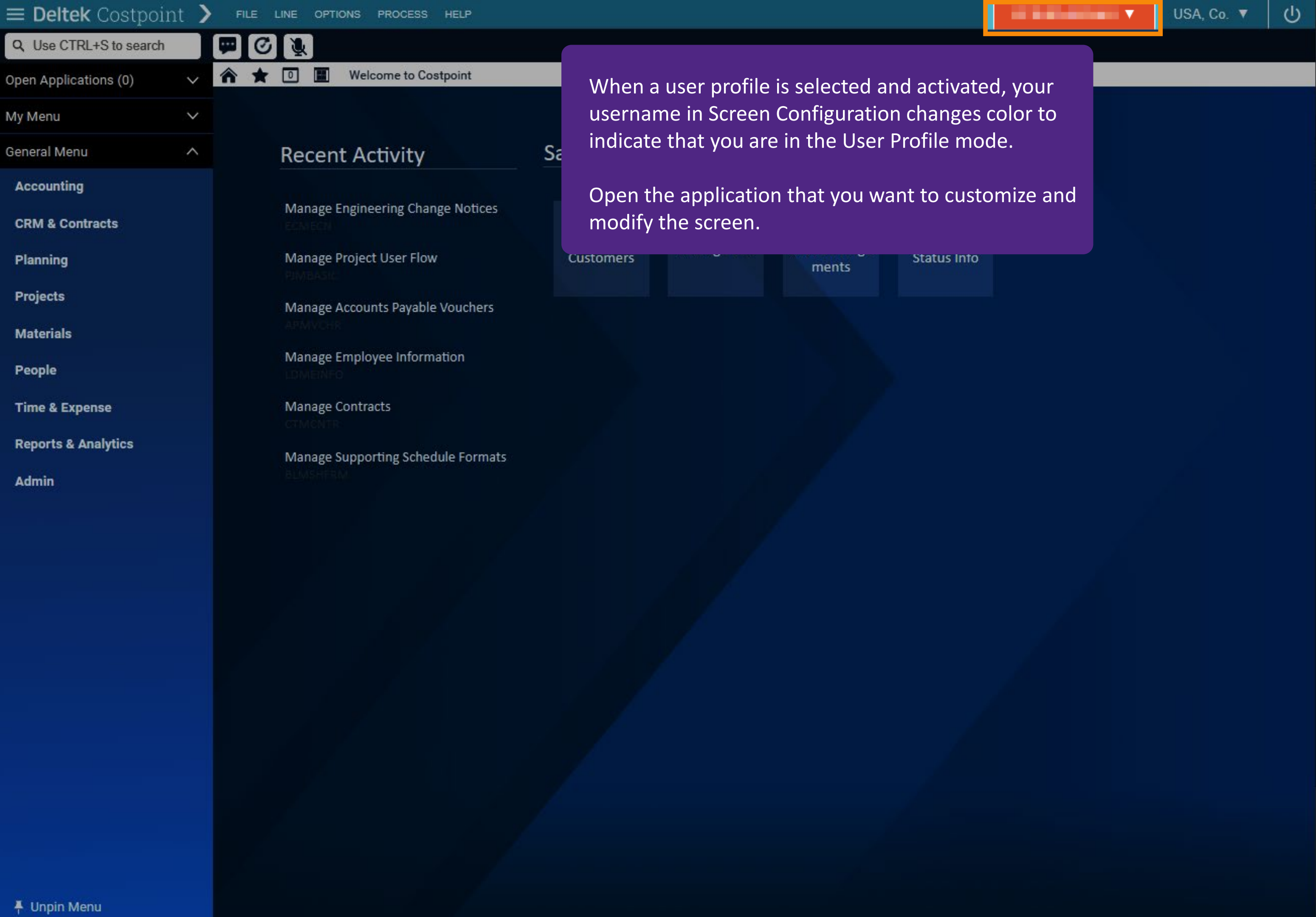
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



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

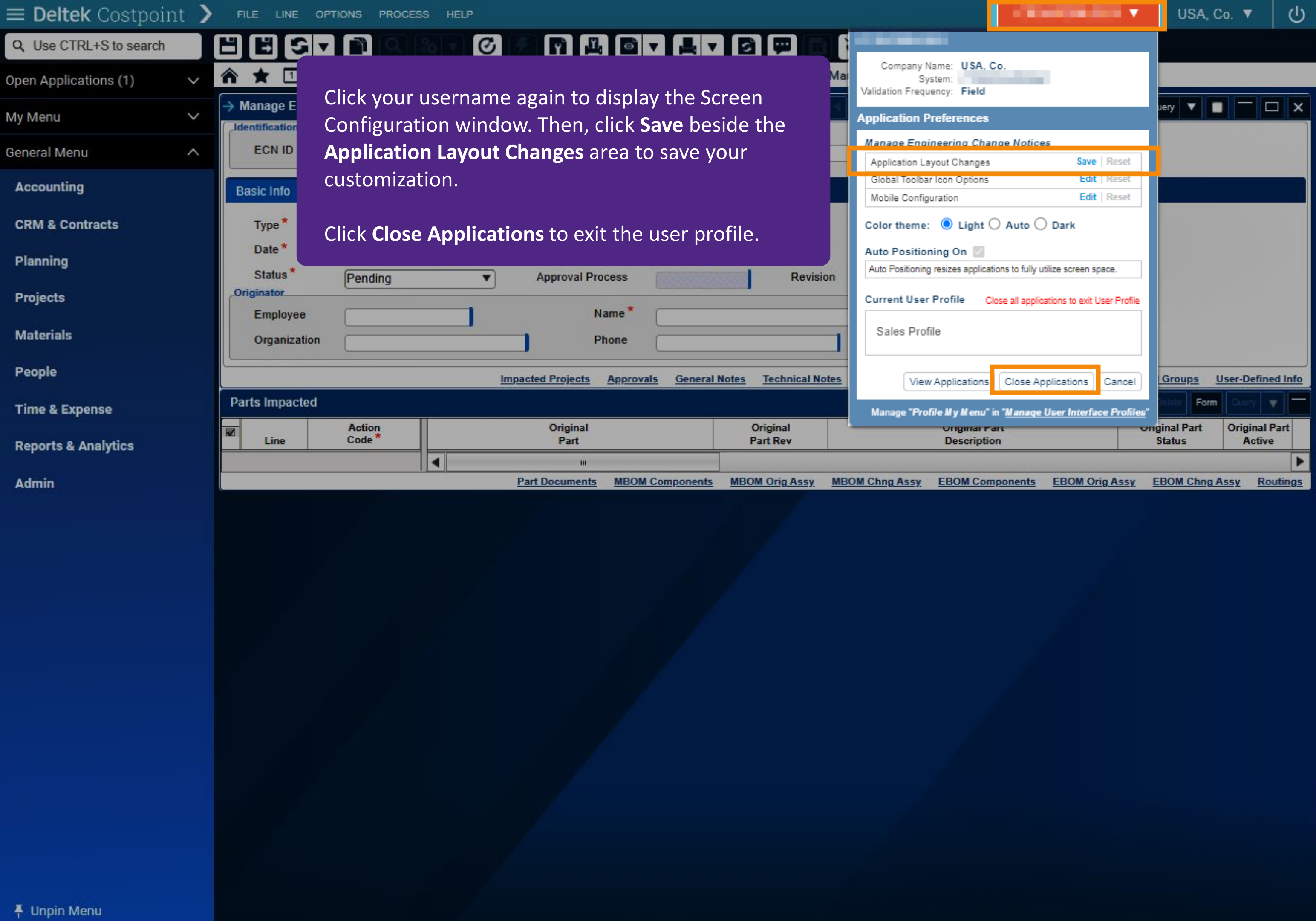
Auto Positioning

Manage User Profiles

Configure User Preferences



Others



Costpoint User Interface

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Screen Configuration

Application Preferences

Application Layout Changes

Global Toolbar Icon Options

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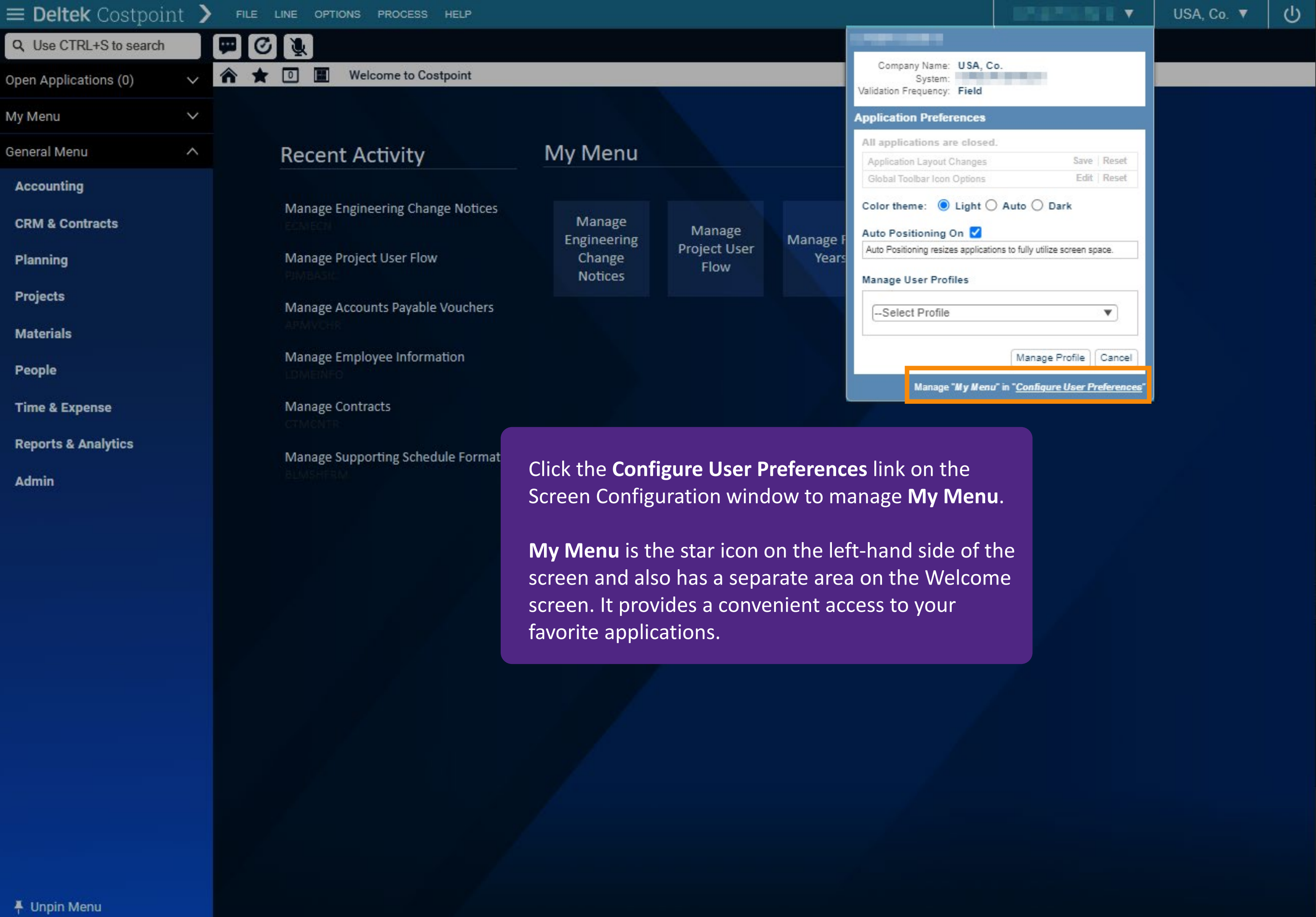
Auto Positioning

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



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Screen Configuration

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Configure User Preferences



Others

Deltek Costpoint

FILELINEOPTIONSPROCESSHELP

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

Admin > System Administration > System Administration Controls > Configure User Preferences

Configure User Preferences

1 of 1 Existing

User ID

User Name

User Information

Default Information

Default Application

Application Name

Reporting Company

Default Company

Default Report Delivery Options

System Printer

Print to File

Local Printer

Download

Email

Archive

Phone

Phone

Extension

Mobile Carrier

Locale

Locale ID

English (United States)

Password Information

Old Password

New Password

Verification

Enable AutoC

Enable Hey D

Auto Positioning

Delegate Approvals

SMS Message

Change Default Period

UI Profiles

Notification Override

Passkeys

My Menu Application List

Find

Query

Select

	Application	Name	Domain
<input checked="" type="checkbox"/>	ADMCHGTREE	Charge Trees	Time & Expense
<input type="checkbox"/>	ADMDESKTOP	MyDesktop	Time & Expense
<input type="checkbox"/>	ADMEMAILTEXT	E-mail Text	Time & Expense
<input type="checkbox"/>	ADMEMPLGRP	Resource Groups	Time & Expense
<input type="checkbox"/>	ADMEMPLINFO	Resource Information	Time & Expense
<input type="checkbox"/>	ADMEMPLPREF	Profile	Time & Expense

My Menu

New

Copy

Delete

Query

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

Default My Menu

Costpoint User Interface

Navigation



Global Menu



Global Icons



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Screen Configuration

Application Preferences

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FILE LINE OPTIONS PROCESS HELP

Q Use CTRL+S to search

Open Applications (1)

My Menu

General Menu

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Reports & Analytics

Admin

Admin > System Administration > System Administration Controls > Configure User Preferences

Configure User Preferences

1 of 1 Existing

User ID

User Name

User Information

Default Information

Default Application

Application Name

Reporting Company

Default Company

Default Report Delivery Options

System Printer

Print to File

Local Printer

Download

Email

Archive

Phone

Phone

Extension

Mobile Carrier

Locale

Locale ID

English (United States)

Notification

Notify When Batch Job Is Completed

Preferred Notification Method

Device Notification;Email;SMS Message

Subscribe

Password Information

Old Password

PIN

New Password

Verification

Add new passkey

Delegate Approvals

User ID

Start Time

End Time

Enable AutoComplete

Enable Hey Deltek! Voice Interaction

Auto Positioning

Yes

My Menu Application List

Find

Query

My Menu

New

Copy

Delete

Find

Query

Application	Name	Domain	Sequence	Line Type	My Menu Title	Create Nav Banner?	Application
ADMCHGTREE	Charge Trees	Time & Expense	10	Application	Manage Engineering Change	<input type="checkbox"/>	ECMECN
ADMDESKTOP	MyDesktop	Time & Expense	20	Application	Manage Project User Flow	<input type="checkbox"/>	PJMBASIC
ADMEMAILTEXT	E-mail Text	Time & Expense		Application	Charge Trees	<input type="checkbox"/>	ADMCHGTREE
ADMEMPLGRP	Resource Groups	Time & Expense		Application	MyDesktop	<input type="checkbox"/>	ADMDESKTOP
ADMEMPLINFO	Resource Information	Time & Expense					ADMEMAILTEXT
ADMEMPLPREF	Profile	Time & Expense					

Default My Menu

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

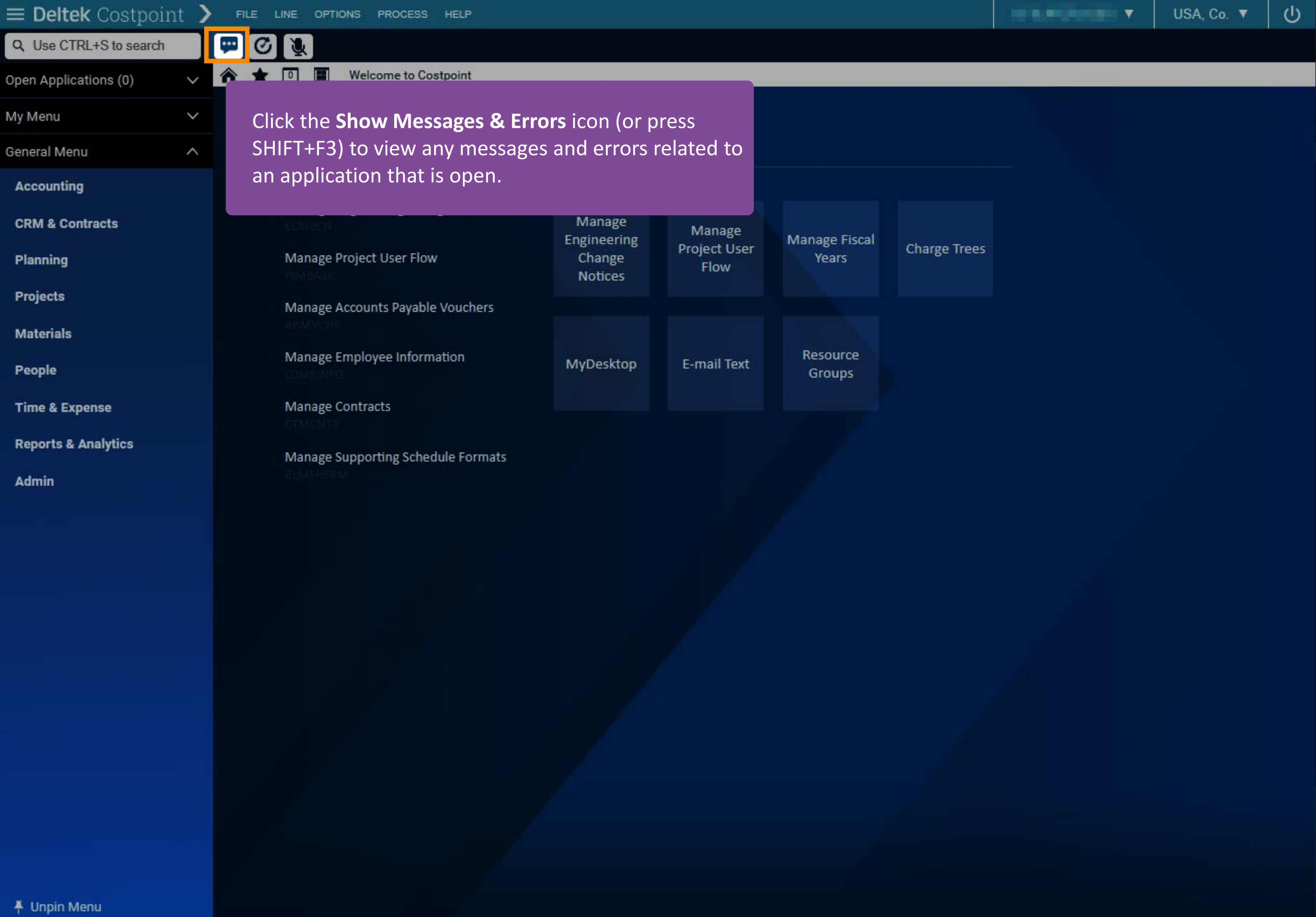
Show Messages & Errors

View Action and
Report Status

Hey Deltek!

Select Company

Logout



Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

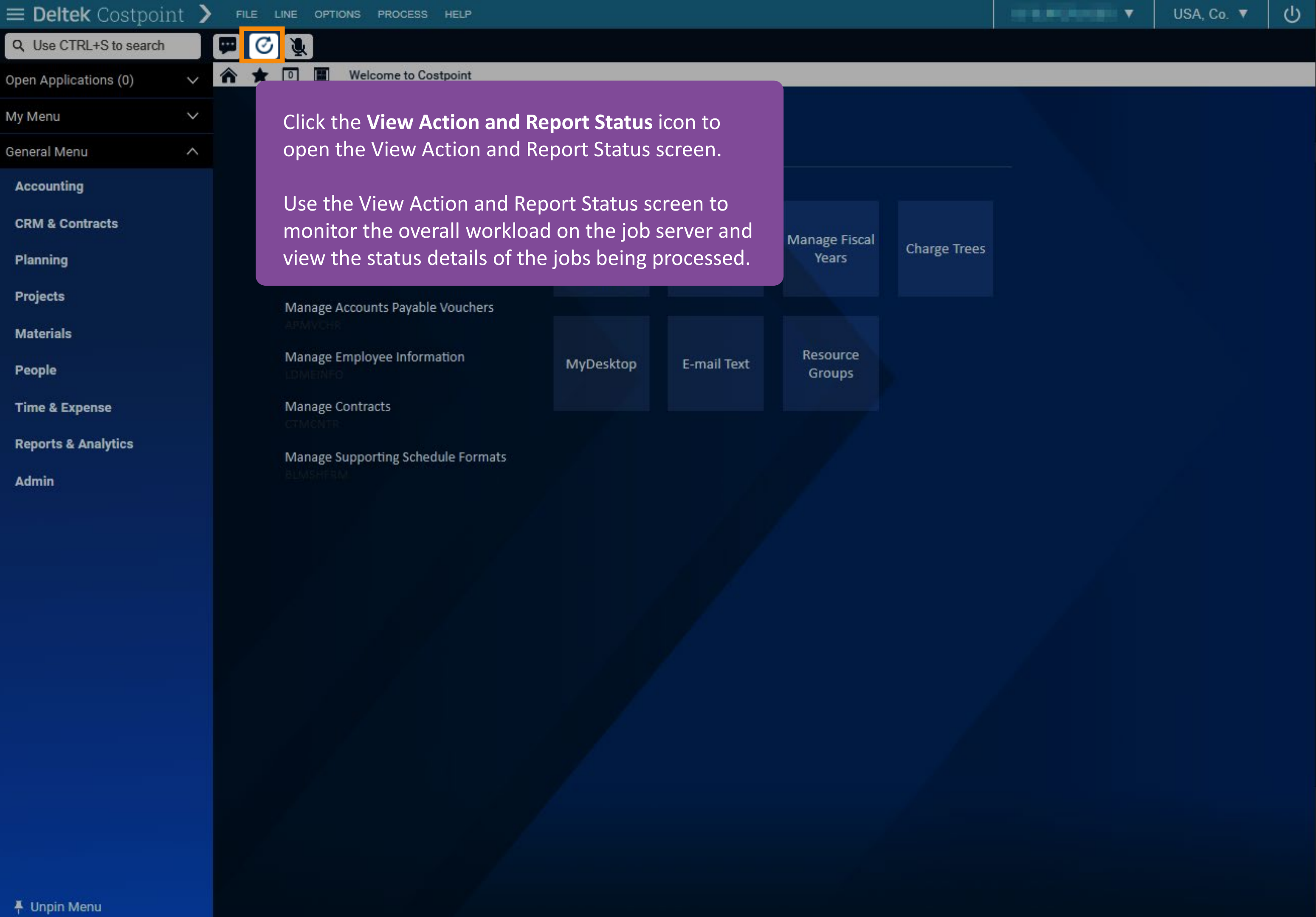
Show Messages & Errors

View Action and
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Hey Deltek!

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Costpoint User Interface

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Screen Configuration



Others

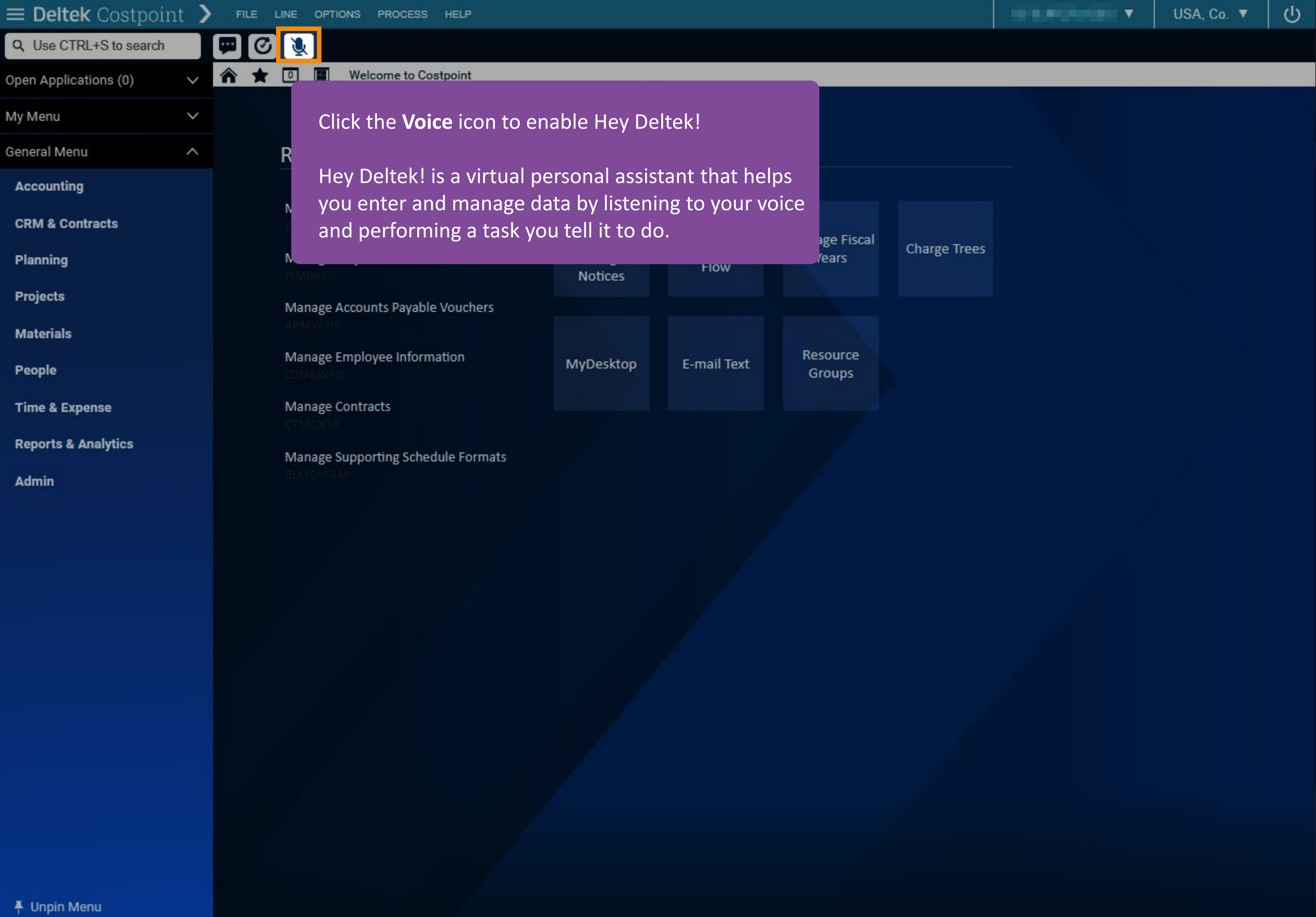
Show Messages & Errors

View Action and
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Hey Deltek!

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Logout



Costpoint User Interface

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Screen Configuration



Others

Show Messages & Errors

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Deltek Costpoint

FILELINEOPTIONSPROCESSHELP

Q Use CTRL+S to search

Open Applications (0)

My Menu

General Menu

Home

Star

Calendar

Document

Welcome to Costpoint

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

Admin

Recent Activity

Manage Engineering Change Notices

ECMECH

Manage Project User Flow

PIMBASIC

Manage Accounts Payable Vouchers

APMYCHR

Manage Employee Information

LDMEINFO

Manage Contracts

CTMCNTR

Manage Supporting Schedule Formats

BLMSHFRM

My Menu

Manage Engineering Change Notices

MyDesktop

E-mail Text

Resource Groups

Click the company name you are currently using to select a different company.

Lightbulb icon

Note:

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

Unpin Menu

Costpoint User Interface

Navigation



Global Menu



Global Icons



Subtasks



Screen Configuration



Others

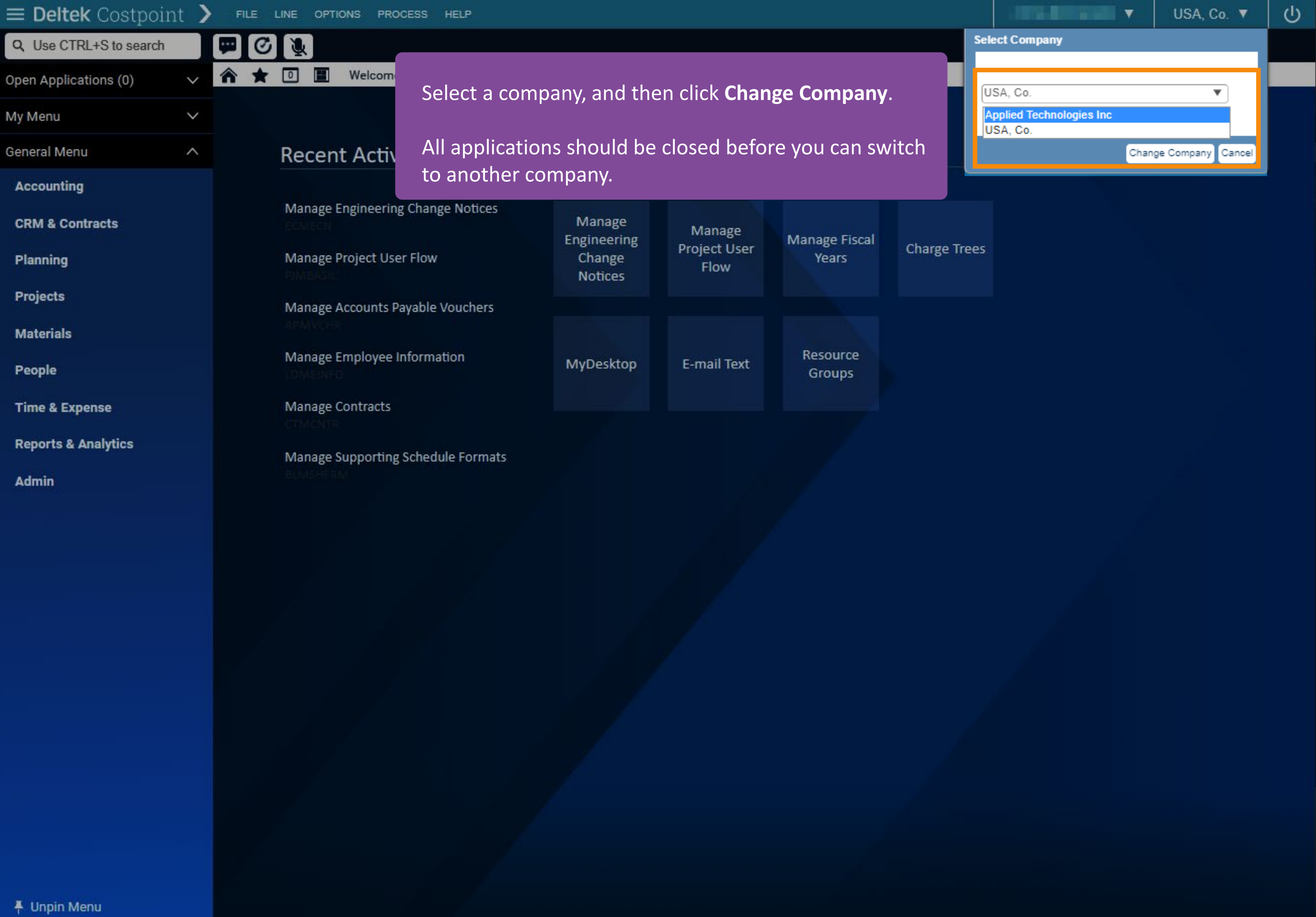
Show Messages & Errors

View Action and
Report Status

Hey Deltek!

Select Company

Logout



Costpoint User Interface

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Others

Show Messages & Errors

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FILELINEOPTIONSPROCESSHELP

Q Use CTRL+S to search

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Admin

Unpin Menu

HomeStarCalendarTask

Welcome to Costpoint

Recent Activity

My Menu

Manage Engineering Change Notices
ECMECH

Manage Project User Flow
PIMBASIC

Manage Accounts Payable Vouchers
APMVCHR

Manage Employee Information
LDMEINFO

Manage Contracts
CTMCNTR

Manage Supporting Schedule Formats
BLMSHFRM

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

Applied Technologies Inc

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

Deltek Costpoint

FILELINEOPTIONSPROCESSHELP

Q Use CTRL+S to search

HomeStarCalendar

Welcome to Costpoint

Open Applications (0)

My Menu

General Menu

Accounting

CRM & Contracts

Planning

Projects

Materials

People

Time & Expense

Reports & Analytics

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

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Hey Deltek!

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Deltek.

Costpoint®

Install

USERNAME

PASSWORD

Enter a valid password

☒ Remember me

Log In

+ ADDITIONAL CRITERIA

This concludes the
Costpoint User Interface Quick Steps.