




Deltek

Deltek Costpoint®

Costpoint Word Template Add-in
Installation Guide

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Overview

The Costpoint Word Template add-in enables you to build custom report templates in MS Word.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it [here](#) free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at the far right.
2. In the **Annotations** pane that displays, click  **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.

Note: Deltek recommends that you save the document to a slightly different filename so as to keep the original from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login**.
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

Note: When you log on for the first time, DSM asks you to select a default folder where Deltek products are to be downloaded.

You can change this folder anytime in the Settings dialog box.

6. In the left pane, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download.

Options include:

- **Complete**
- **Cumulative Updates**
- **HotFixes**
- **Sub-Release**

8. In the table, select the check box that corresponds to the Deltek product that you want to download.

The right pane displays a message stating that the product has been added to the download queue.

Note: To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

1. In your Web browser, go to <https://dsm.deltek.com/DeltekSoftwareManagerLite>.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Logon**.
3. When the Deltek Software Manager Lite page displays, select a product from the drop-down list.
4. Click the product type that you want to download.

Note: The download behavior and download folder may differ depending on the browser and browser settings that you are using.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click [here](#).
- To view a tutorial on how to use Deltek Software Manager, click [here](#).
- To view more information on troubleshooting Deltek Software Manager, click [here](#).

Note: When you click a link, you will be asked to log into DSM if you aren't already logged in.

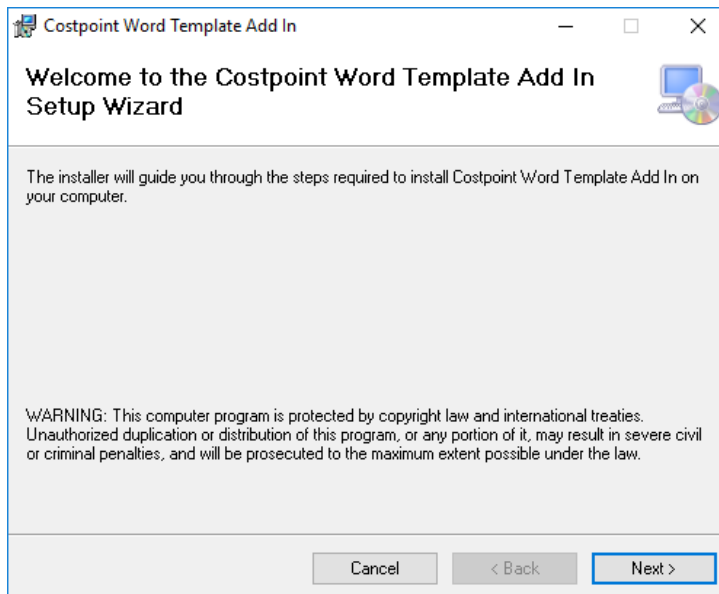
The Costpoint Word Template Add-In

The Costpoint Word Template add-in is available to SaaS and On-Premise users. The add-in works on the Windows version of MS Word Desktop version 2013 and higher (not Office 365 or Mac versions).

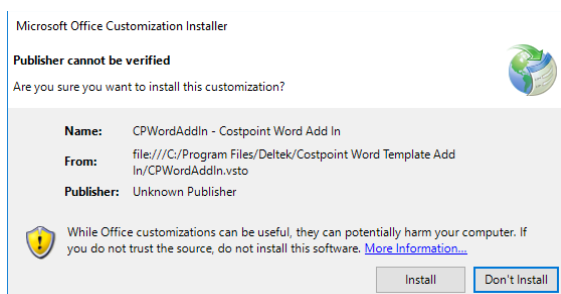
Installing the Costpoint Word Template Add-In

To download the Costpoint Word Template add-in:

1. In the Deltek Software Manager, locate and save the **DeltekCostpointwordTemplateAddIn_Build01.exe** file to your desktop.
2. On your desktop, right-click the file and click **Install**.
3. Select all the defaults in the installation wizard.
4. Launch MS Word. The Costpoint Word Template Add In Setup Wizard displays. You are only prompted for the initial install.



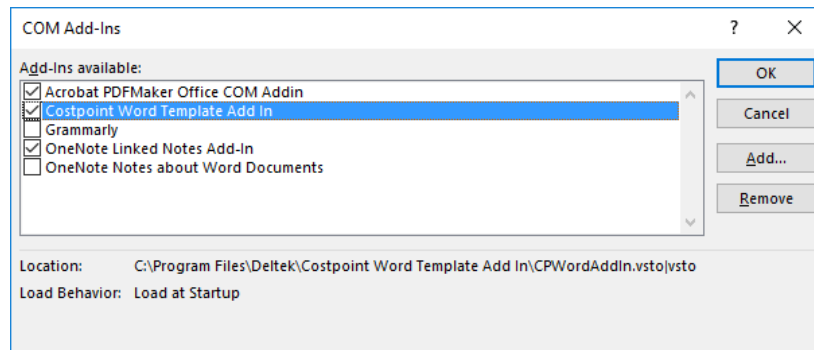
5. Click **Install** and accept the defaults to complete the setup wizard.



6. Display the Costpoint tab.
 - a. Click **File > Options**.
 - b. In the Word Options window, click **Add-Ins** in the left pane.

The Costpoint Word Template Add-In

- c. In the **Manage** list, select **COM Add-ins** and then click **Go**.
- d. Select the **Costpoint Word Template Add In** check box and then click **OK**.



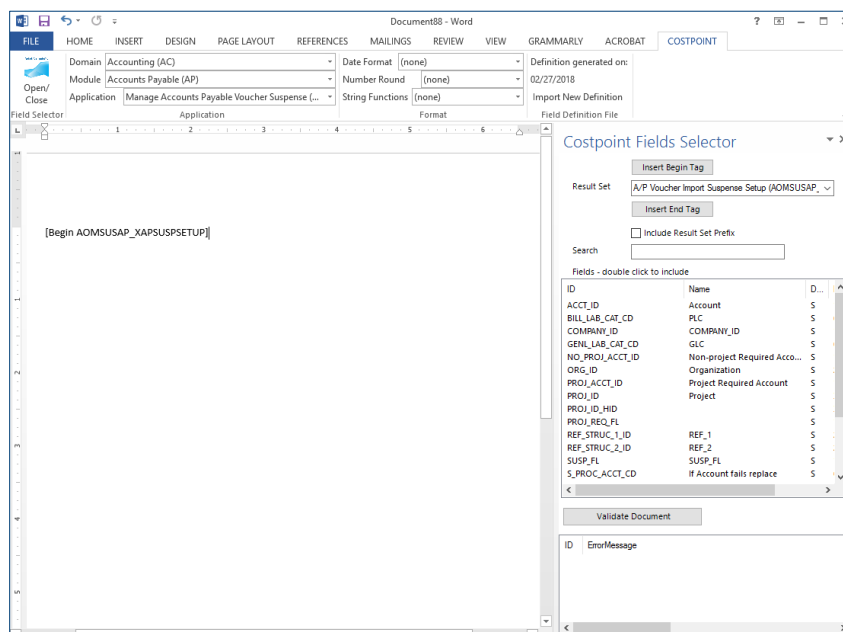
The Costpoint tab is now visible in Word.

Using the Costpoint Word Template Add-In

The Costpoint add-in consists of three sub-tabs:

- **Application** - Use this sub-tab to select the domain, module, and the application to apply the template. The available result sets for the template are based on this selection.
- **Format** - Use this sub-tab to select a format for the corresponding data type field in the Costpoint Fields Selector. The format options are Date (D), Number (N), and String (S).
- **Field Definition File** - Use this sub-tab to import the field definition file (CPMetadata.xml) and to view the date the file was last generated. This file contains result set data, including Extensibility fields, from Costpoint.

Use the Costpoint Fields Selector in the right pane to select the result set and data fields you want to include in the template.



Appendix A: If You Need Assistance

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

Customer Services

For over 30 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 Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

About Deltek

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