

Automating Deltek Costpoint to Improve GovCon Compliance & Efficiency



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- Technical consultant with Redstone GCI, specializing in business intelligence, data analysis, and extract-transform-load (ETL) efforts
- 28 years experience with the Deltek product suite as a user, administrator, and consultant
- Extensive experience with Costpoint software installation and configuration
- Background in IT, ranging from helpdesk operations to department management
- Experienced programmer and database administrator



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Learning Objectives

- ✓ Saving Application Parameters
- ✓ Setting Up Process Scheduling
- ✓ Scheduling Processes As Jobs
- ✓ Monitoring Scheduled Jobs
- ✓ Interacting With Approval Workflows
- ✓ Understanding Workflow Architecture
- ✓ Administering Workflow Case
- ✓ Understanding Extensibility w/Workflows

Improving Compliance

Improving Efficiency



- Ensuring that critical processes (such as report table updates and revenue computation) are executed consistently and in a timely fashion.
- Ensuring that the proper people are included in approval decisions, and that approval is documented, recorded, and reportable.
- Ensuring that business rules and standards are reproducibly applied to ERP and ERP-adjacent data.

Is It An Application Or A Screen?



- Costpoint documentation refers to applications.
- Common parlance is to call an application a screen.
- This presentation will use the terms interchangeably.

Before We Start – User Notification Setup

- Make sure your users will be able to receive notifications for both scheduled jobs and workflows.

Manage Use... New Copy ▾ ⋮ □ ⏪ ⏩ ⏴ ⏵

User ID * 19105.AARON.WILSON

Information Workflow Printing Defaults Authentication

User Information

Employee ID 1000015 🔍

Phone

Extension Mobile -None- Carrier

Locale ID 🔍

Email **awilson@redstonegci.com** ✉

Preferred Notification Method Email(System Default) ▾

Company Access | Assigned User Groups | Module Rights

Manage Use... New Copy ▾ ⋮ □ ⏪ ⏩ ⏴ ⏵ Find

User ID * 19105.AARON.WILSON User Name * Wilson, A

Information Workflow Printing Defaults Authentication Web Services User In

Workflow Email

☒ Send Workflow Activity ☒ Send Workflow Messages

Company Access | Assigned User Groups | Module Rights More

Part I:

Parameters & Scheduling

Saved Application Parameters

- ✓ Costpoint applications that perform a computation or generate a report typical require many prompts to be filled in before running.
- ✓ Filling in these prompts once, and then saving the prompts for later use, will greatly enhance the usability of the applications
- ✓ Saved application parameters are also critical for scheduling applications to run on their own.

Saved Application Parameters

Any application that shows Parameter ID/Description is eligible.

The screenshot shows the Costpoint application interface. At the top, there is a header bar with the Costpoint logo, a navigation menu, and a 'Save' button. Below the header, there is a window titled 'Update Project Status ...'. Inside this window, there is a form with two fields: 'Parameter ID*' and 'Description*'. The 'Parameter ID*' field contains the value 'MYPSRUPDATE' and the 'Description*' field contains the value 'My Own PSR Update Settings'. These two fields are highlighted with a red rectangular box. Below these fields, there is a section titled 'Selection Ranges' which contains a table with columns for 'Option', 'Fiscal Year*', 'Period*', 'Subpd*', and 'Ending Date'. The table has two rows of data: 'Accounting Period' with values 'One', '2025', '9', '1', and '09/26/20:1'; and 'Projects' with values 'One' and '700000.1.0.0001.0001AA.AA'.

Option	Fiscal Year*	Period*	Subpd*	Ending Date	
Accounting Period	One	2025	9	1	09/26/20:1
Projects	One	700000.1.0.0001.0001AA.AA			

Saved Application Parameters

If the application performs a posting process, you can set it up to email the posting report to you as part of the saved parameter.

- Open the application, query for the saved parameter, and then open the Print Options dialog.
- Turn on the email delivery option and fill out the Email tab, then click Okay.
- Finally, save the parameter again to preserve the email settings.

Print Options

Parameter ID: MYJEPOST Description: Posting JEs (AJW)

Delivery Options

☐ System Printer ☐ Print to File ☒ Download ☒ Email ☐ Archive ☐ Local Printer

Document Locale

Locale: As Generated

Pages

☒ All Pages:
☒ Print Cover Page (Enter page numbers and ranges separated by comma(s), e.g.:1,4,10-15)

Queueing

☐ Submit Batch Job

System Printer File Options **Email** Archive

Email

To: awilson@redstonegci.com
Cc: awilson@redstonegci.com
Subject: awilson@redstonegci.com

Additional Attachments: # File Name Alternate File Location

Text:

Ok Cancel

Saved Application Parameters

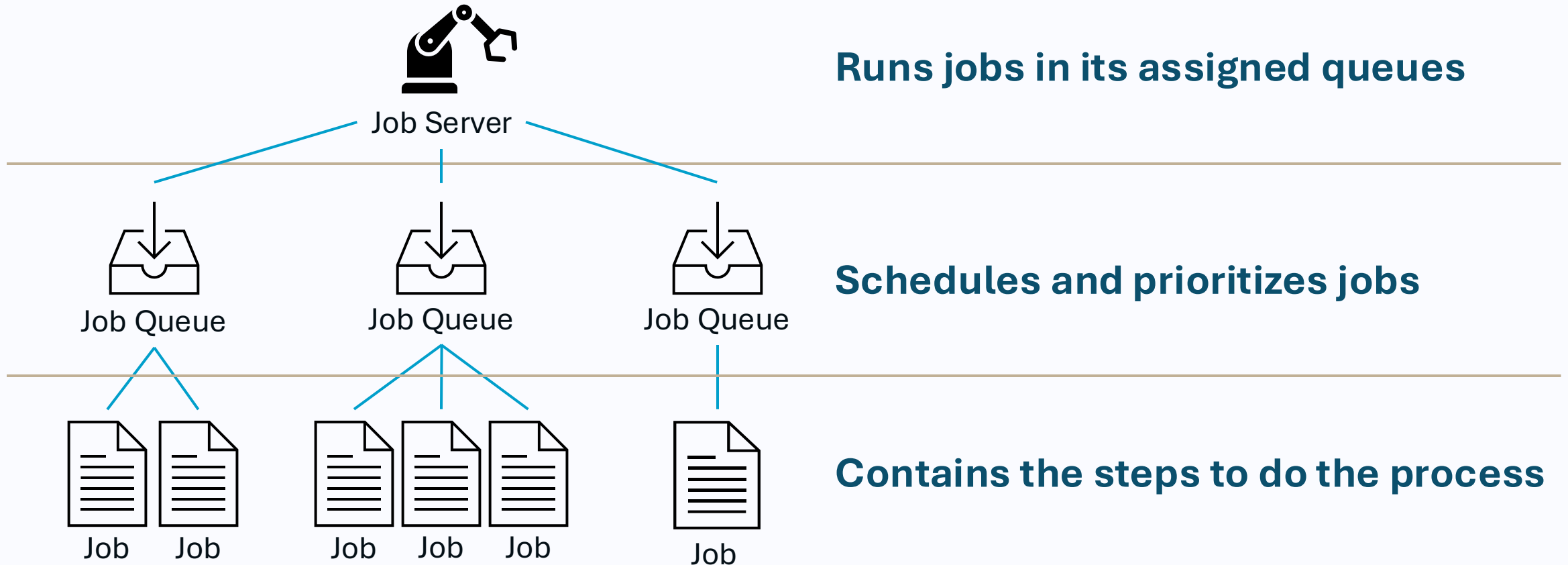
- ✓ If any parameter value needs to change, a user will need to actively change it and then save the modified parameter.
- ✓ One value that needs to be updated frequently is the accounting period and/or subperiod.
- ✓ The Change Period Report Parameters utility can make this process easier for a limited set of applications.
 - This utility is located under Cost and Revenue Processing Utilities.

What Is A Job?



- A job is generally any process that runs in Costpoint unattended.
- Jobs define a sequence of steps called operations that consist of:
 - An application (screen) that performs a process or generates a report
 - A saved parameter that provides the required values for the process
- Jobs are submitted to job queues that determine when the job executes.

Job Server Architecture



Initial Setup For Scheduling

- If you've never used scheduled jobs before, there are some things you need to do first before getting started.
- Most of this is a one-time setup, but there may be reasons to create additional queues or other objects in the future.
- The order of setup is not very intuitive...
 - ... but we'll walk you through it.



Initial Setup For Scheduling

- Create one or more job queues.
 - Queues can be set to process jobs sequentially or non-sequentially.

Admin

Job Management

Job Management Codes

Manage Job Queues

The screenshot shows the 'Manage Job Queues' interface in the Costpoint system. The top navigation bar includes the 'Costpoint' logo, 'Actions', 'Save', and a dropdown for 'CO 1 - FULL PAYROLL'. The main content area is divided into several sections:

- Manage J...:** Contains a 'Find' search bar, a 'Query' dropdown, and a 'Process Sequentially' checkbox. The 'Job Queue ID' is set to 'NIGHTLY'.
- Attached Ser...:** A table with two columns: 'Server' and 'Queue Active'. The 'Server' column has a checked checkbox, and the 'Queue Active' column has an unchecked checkbox.
- Scheduled Jobs:** A table with columns: 'Job', 'Description', 'Status *', 'Start Date', 'Start Time', 'Priority', 'Recur Every', 'Recurring Timeframe *', and 'End Date'. The table is currently empty.
- Scheduled Job Steps:** A section with a 'More' button.

On the right side of the interface, there is a vertical sidebar with various icons for navigation and actions.

Initial Setup For Scheduling

- Create one or more job servers.
 - One server is almost always enough to handle any number of jobs.

Admin

Job Management

Job Management
Processing

Start/Stop Job Server

Costpoint

Start/Stop Job Server

Server Name *	Status	Destination Server *	Daily Shutdown Time	Daily Restart Time
MYSERVER	Not Running	Default Server or Cluster		

Available Job Queues

Job Queue	Process Sequentially
BNP	N
MRPNIGHTLY	N
NIGHTLY	Y
TE_NOTIFY	N

Assigned Job...

Job Queue *	Active for Server	Process Sequentially
-------------	-------------------	----------------------

- If a job server already exists, **do NOT** create a new one.

Initial Setup For Scheduling

- Assign one or more queues to the job server and save.
 - Be sure to check the Active For Server box for each assigned queue.
- Click the “Start” button.

Admin

Job Management

Job Management

Processing

Start/Stop Job Server

The screenshot displays the 'Start/Stop Job Server' window in the Costpoint application. The window has a top bar with 'Costpoint' branding, navigation icons, and a dropdown menu for 'CO 1 - FULL PAYROLL'. Below the top bar, there are buttons for 'New', 'Copy', 'Delete', 'Find', and 'Query'. The main content area is divided into two sections. The top section, titled 'Start/Stop Job Server', contains a table with columns: 'Server Name *', 'Status', 'Destination Server *', 'Daily Shutdown Time', and 'Daily Restart Time'. The table has one row with 'MYSERVER' as the server name and 'Running' as the status. Below the table are 'Start' and 'Stop' buttons. The bottom section, titled 'Available Job Queues', contains a table with columns: 'Job Queue', 'Process Sequentially', and a 'Select' button. The table has four rows: 'BNP', 'MRPNIGHTLY', 'NIGHTLY', and 'TE_NOTIFY'. To the right of this table is another section titled 'Assigned Job ...' with buttons for 'New', 'Copy', 'Delete', and 'Query'. This section contains a table with columns: 'Job Queue *', 'Active for Server', and 'Process Sequentially'. The table has one row with 'NIGHTLY' as the job queue, 'Y' for 'Active for Server', and 'Y' for 'Process Sequentially'.

Server Name *	Status	Destination Server *	Daily Shutdown Time	Daily Restart Time
MYSERVER	Running	Default Server or Cluster		

Job Queue	Process Sequentially
BNP	N
MRPNIGHTLY	N
NIGHTLY	Y
TE_NOTIFY	N

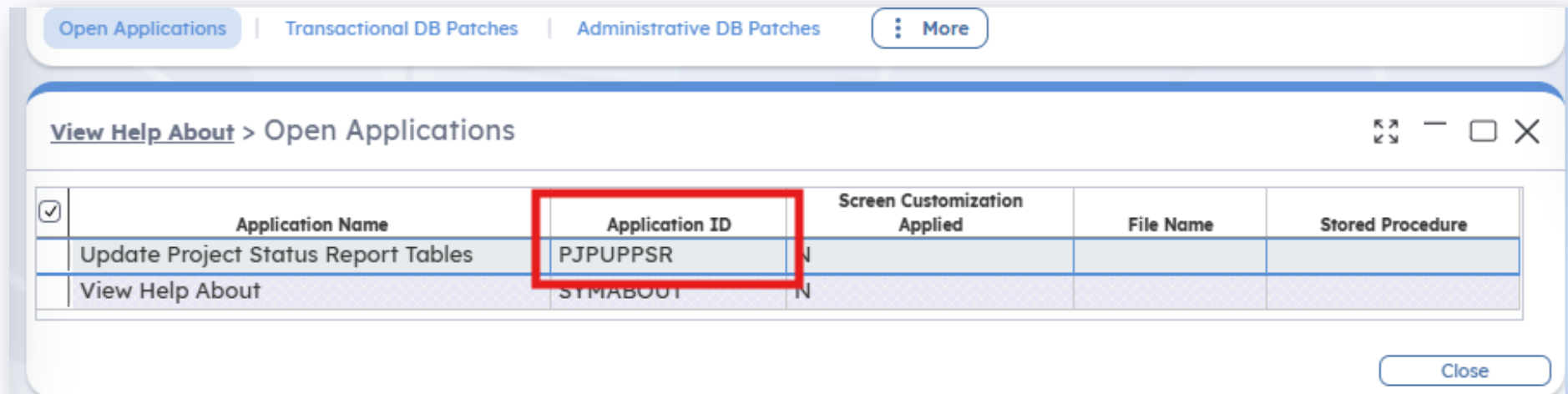
Job Queue *	Active for Server	Process Sequentially
NIGHTLY	Y	Y

Creating a Scheduled Job

- ✓ Start by opening the application you wish to schedule.
- ✓ Ensure there is a saved parameter that contains the values needed when run as part of the schedule.
 - We suggest incorporating “SCHD”, “JOB”, or something similar as part of the parameter ID for clarity.

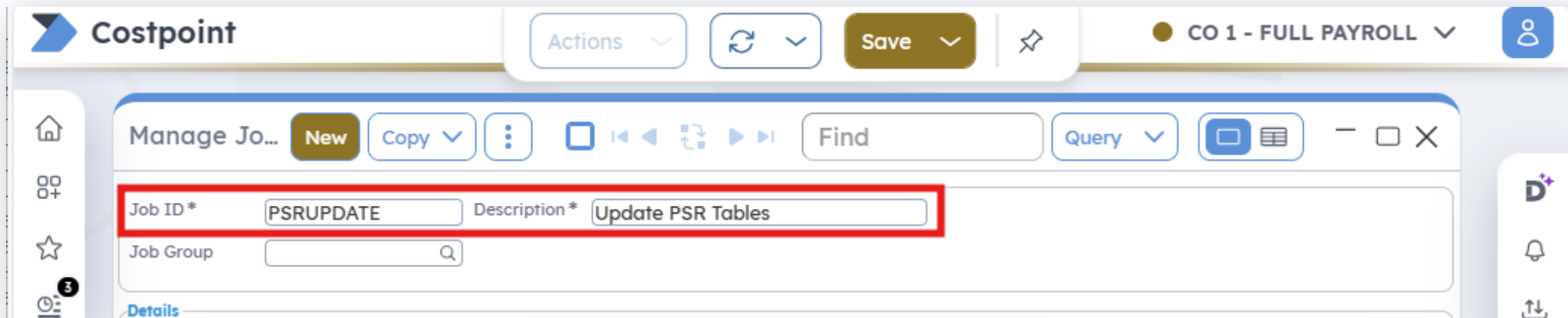
Creating a Scheduled Job

- While the application is still open, go to the Help menu and select About.
- In the Open Applications subtask at the bottom of the View Help About screen, note application ID for your application.



Creating a Scheduled Job

- On the Manage Jobs screen, enter a Job ID and Description.



The screenshot displays the 'Manage Jobs' interface in the Costpoint system. The top navigation bar includes the 'Costpoint' logo, a dropdown menu for 'Actions', a refresh button, a 'Save' button, and a user profile icon. The main header area shows 'Manage Jo...' followed by 'New', 'Copy', and a list icon. Below this, there are navigation controls (back, forward, search) and a 'Find' input field. The 'Job ID*' field is populated with 'PSRUPDATE' and the 'Description*' field is populated with 'Update PSR Tables'. These two fields are highlighted with a red rectangular border. Below the highlighted fields is a 'Job Group' input field with a search icon. The bottom of the screen shows a 'Details' link.

Creating a Scheduled Job

- On the Manage Jobs screen, add one or more operations.
- Enter or select the application ID from earlier under “Application” and select the appropriate saved parameter, then save.

Job Operations

New Copy Delete Query

Module	Application *	Application Name	Parameter *	My Own
PI	PJPUPPSR	Update Project Status Report Tables	MYPSRUPDATE	My Own

Submitting a Scheduled Job to a Queue

- Query for the new job, populate the Queue box and the appropriate scheduling prompts.
- Click the Submit To Queue button.

Admin

Job Management

Job Management

Processing

Submit Job to Queue

The screenshot shows the 'Submit Job to Queue' interface in the Costpoint system. The interface includes a top navigation bar with 'Costpoint' and 'CO 1 - FULL PAYROLL'. The main form is divided into several sections:

- Identification:** Job (MRPNIGHTLY), MRP Nightly Run, Queue (NIGHTLY), and a checkbox for 'Notify When All Job Steps Are Completed'.
- Execute:** Execution Option (Start Time/Date), Priority (50), Start Date (09/05/20), and Start Time (10:00:00 PM).
- Job Recurrence:** Every (1), Days (Days), Until, End Date, and End Time.
- Comments:** A text area for comments.
- Job Parameters:** A table with columns for Module, Application, Application Name, Parameter, Parameter Description, Process, and Re.

The 'Submit To Queue' button is located at the bottom right of the form.

Module	Application	Application Name	Parameter	Parameter Description	Process	Re
MR	MRPMRP	Update Material Requirements Plan	MRPNIGHTLY	NIGHTLY MRP RUN	Update Material Requirements Plan	

Submitting a Scheduled Job to a Queue

Costpoint Actions Refresh Save

CO 1 - FULL PAYROLL

Submit Job to Queue

2 of 2 Existing

Query

Identification

Job: MRPNIGHTLY MRP Nightly Run Queue: NIGHTLY

☐ Notify When All Job Steps Are Completed

Execute

Execution Option: Start Time/Date

Priority: 50

Start Date: 09/05/20

Start Time: 10:00:00 PM

Job Recurrence

Every: 1 Days

Until:

End Date:

End Time:

Comments:

Submit To Queue

Job Parameters

	Module	Application	Application Name	Parameter	Parameter Description	Process	Re
<input checked="" type="checkbox"/>	MR	MRPMRP	Update Material Requirements Plan	MRPNIGHTLY	NIGHTLY MRP RUN	Update Material Requirements Plan	

Managing Job Queues

- The Manage Job Queues application allows you to review and modify current job schedules.
- The Status dropdown allows you to hold or release the schedule.

Manage Job Queues

New

Copy ▾

Delete

Find

Query ▾

<input checked="" type="checkbox"/>	Job Queue ID*	Process Sequentially
<input type="checkbox"/>	BNP	<input type="checkbox"/>
<input checked="" type="checkbox"/>	MRPNIGHTLY	<input type="checkbox"/>
<input type="checkbox"/>	NIGHTLY	<input checked="" type="checkbox"/>
<input type="checkbox"/>	TE_NOTIFY	<input type="checkbox"/>

Attached Servers

☒

Server

Queue Active

<input type="checkbox"/>	DAILY	Y
--------------------------	-------	---

Scheduled Jobs

Delete

Query ▾

<input checked="" type="checkbox"/>	Job	Description	Status*	Start Date	Start Time	Priority	Recur Every	Recurring Timeframe*	End Date	End Time	Submitting User	Submitted Date/Time
<input checked="" type="checkbox"/>	MRPNIGHTLY	MRP Nightly Run	Scheduled ▾	09/04/2025	02:00:00 AM	0	1	Days ▾			19105.JESSE.KEPNER	06/18/2025 01:25:23 PM

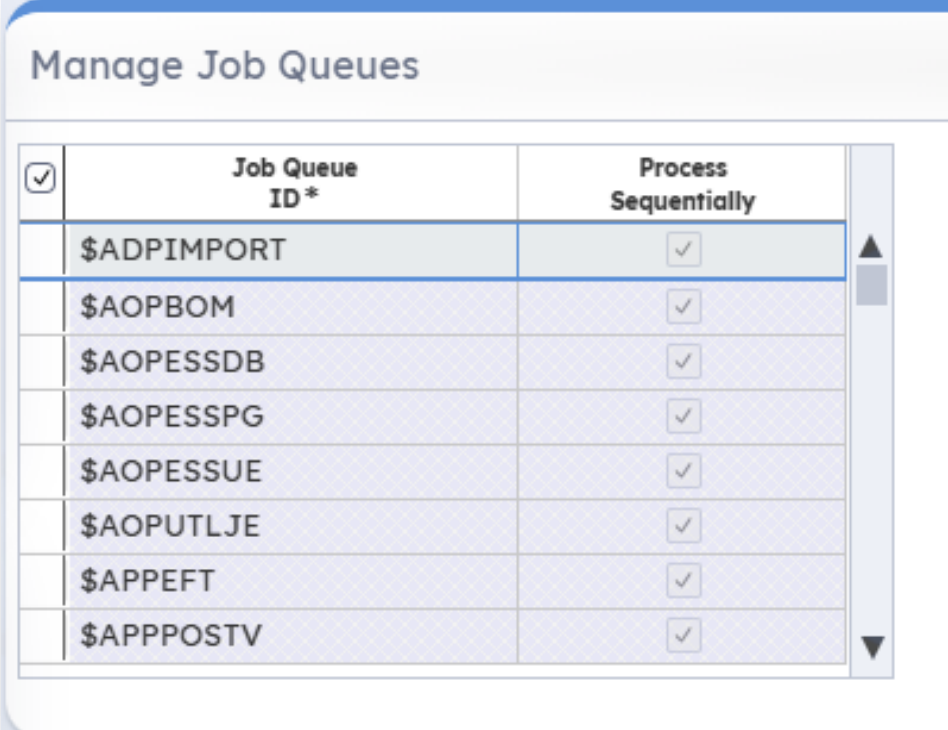
Scheduled Job Steps

More

Cancel Job

System Job Queues

- When using the Manager Job Queues application, you may see many oddly-named queues in the list, all beginning with “\$”.
- These are background processing queues, used by Costpoint when certain functions are run by multiple users at once.
- These queues cannot be modified or deleted, but their jobs can be managed if necessary.



The screenshot shows a web application window titled "Manage Job Queues". It contains a table with two columns: "Job Queue ID*" and "Process Sequentially". The first row is highlighted with a checkmark in a checkbox column. The table lists several job queues, all starting with a dollar sign (\$). A vertical scrollbar is visible on the right side of the table.

<input checked="" type="checkbox"/>	Job Queue ID*	Process Sequentially
<input checked="" type="checkbox"/>	\$ADPIMPORT	<input checked="" type="checkbox"/>
<input type="checkbox"/>	\$AOPBOM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	\$AOPESSDB	<input checked="" type="checkbox"/>
<input type="checkbox"/>	\$AOPESSPG	<input checked="" type="checkbox"/>
<input type="checkbox"/>	\$AOPESSUE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	\$AOPUTLJE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	\$APPEFT	<input checked="" type="checkbox"/>
<input type="checkbox"/>	\$APPPOSTV	<input checked="" type="checkbox"/>

Monitoring Job Progress

- The View Action and Report Status application is the most useful tool for troubleshooting failed scheduled jobs.
- You can search for jobs by initiating user, specific application, time frame, job status, and execution method.

View Action and Report Status

Save Criteria

User: 19105.AARON.WILSON

Application:

Execution Method*: All

Starting Date:

Ending Date:

Job Status:

- ☒ Scheduled
- ☒ Active
- ☒ Completed
- ☒ Failed
- ☒ Hold
- ☒ Suspended
- ☒ Cancel Requested
- ☒ User Cancelled

Job Step Details

Query

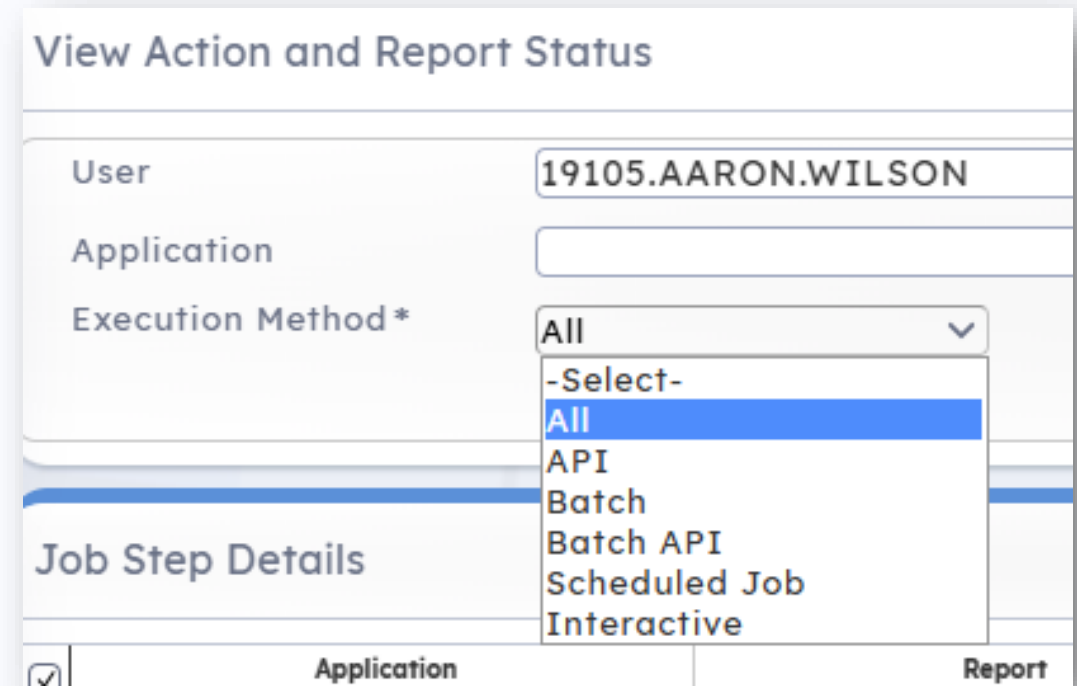
	Application Name	Report Name	Action Name	Submitting User	Client IP Address	Server Name	Company	Execution Method	Priority	Restartable	Status	Submitted Date/Time
<input checked="" type="checkbox"/>	Manage Company Bank Accounts (US	Current Record Information - Horizon		19105.AARON.WILSON	216.186.150.196, 10.50.114.195	DEServer1	1	Interactive		N	Completed	

Cancel Job

Restartable Job Details | Scheduled Job History | More

Monitoring Job Progress

- The View Action and Report Status screen can also give you details about processes other than scheduled jobs.
- For example, searching by the interactive execution method will show any process a user manually initiated in Costpoint by clicking on an action or button.



The screenshot displays the 'View Action and Report Status' window. It features three input fields: 'User' with the value '19105.AARON.WILSON', 'Application' (empty), and 'Execution Method*' (set to 'All'). A dropdown menu is open for 'Execution Method*', showing options: '-Select-', 'All' (highlighted), 'API', 'Batch', 'Batch API', 'Scheduled Job', and 'Interactive'. Below these fields is a section titled 'Job Step Details' which contains a table. The table has a checkbox column, an 'Application' column, and a 'Report' column. The first row has a checked checkbox.

	Application	Report
<input checked="" type="checkbox"/>		

Tips For Schedule Jobs

- ✓ Turn on the “Notify When All Job Steps Are Completed” checkbox when submitting a job to a queue.
- ✓ Job servers and queues are shared between companies, but jobs and saved application parameters are not.
 - Thus, for true multi-company environments, you only need to setup one job server and one job queue at a minimum.
- ✓ Job queues should almost always be set to process jobs sequentially to reduce potential collisions in the database.

Part II:

Workflows

Traditional vs “NEW” Workflow Functionality

- Traditional workflows are a legacy from older versions of Costpoint
 - Mostly used now in certain applications where Deltek has defined special logic to alert users to activities and events.
 - Used for requisition approval, engineering change notices, and some logical processes
- Approval workflows are a more recent enhancement, enabling complicated routing and approval logic across multiple applications.
 - We will focus on these in this presentation.

A Quick Aside

This NEW in the menu drives me nuts....



Interacting With Approval Workflows

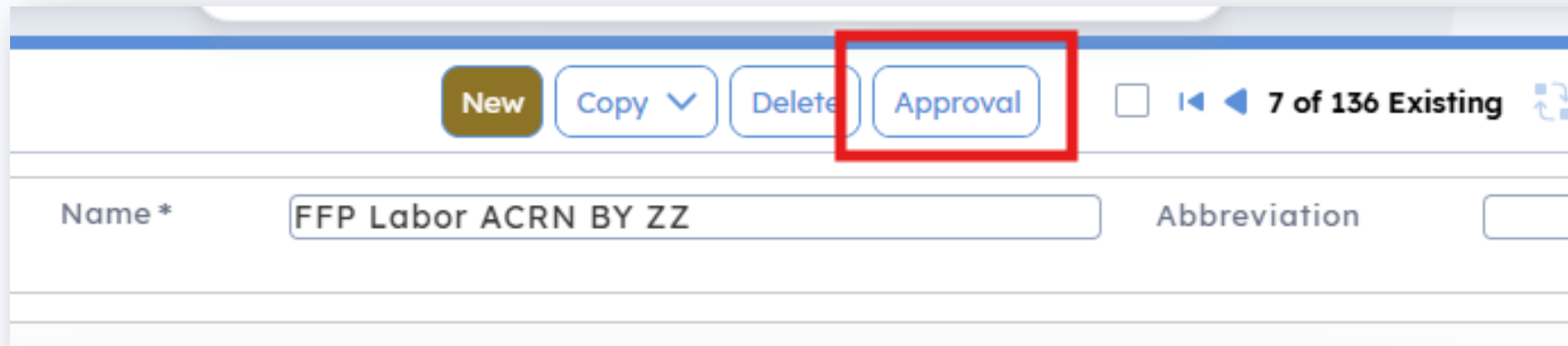
For my example, I have a simple workflow that requires approval of modifications on new projects.

The steps go like this:

- A user creates the project in Manage Project User Flow and initiates the workflow.
- The project manager is notified via email that there is a modification setup to be reviewed.
- The project manager goes to the Manage Modifications application and approves or rejects the workflow.
- The original user is notified of the approval or rejection.

Interacting With Approval Workflows

- When the new project is saved, an Approval button becomes available on the toolbar.



- Clicking the button brings up the Approval subtask.

Interacting With Approval Workflows

- The user starts the approval process by clicking Start Approval.

Project User Flow > Approval

1 of 1 Existing

Approval Workflow

Name: Initial Mod Setup Revision: 0 Start Role:

Start User: Start Time: Status:

Start

Approval Workflow for this record is not started.

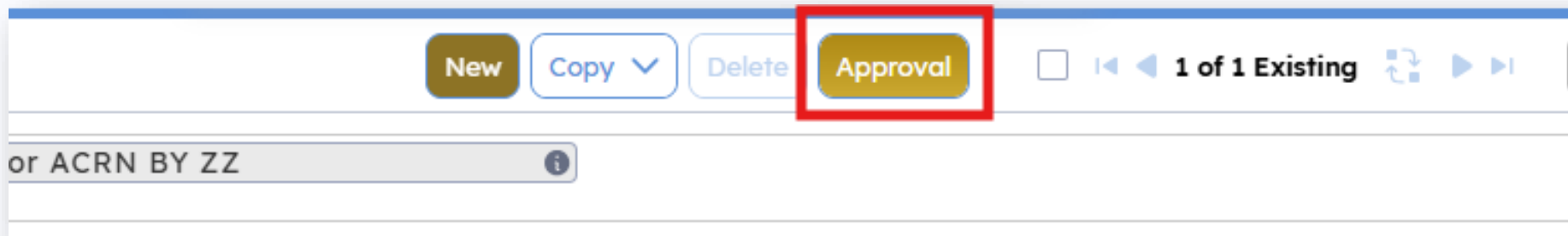
Start Approval

Approval Steps | Approval Role Users | More

Close

Interacting With Approval Workflows

- The project manager receives an email that includes a link to the Manage Modifications application in Costpoint.
- The Approval button appears in gold at the top.



Interacting With Approval Workflows

- Clicking the Approval button opens the Approval subtask as before.
- The project manager may approve or reject, and they can include comments in either scenario.

The screenshot displays the 'Approval' window for a workflow named 'Initial Mod Setup'. The window is titled 'Approval' and shows '1 of 1 Existing' items. The workflow details include: Name: Initial Mod Setup, Revision: 0, Start Role: (empty), Start User: 19105.AARON.WILSON, Start Time: 09/03/2025 08:36:11 PM, and Status: In-Process. The main section is titled 'Approve or Reject' and contains three tabs: 'Approve or Reject' (selected), 'Escalate or Delegate', and 'History of Approval'. Under the 'Approve or Reject' tab, the 'Approval Step Assigned to You' section shows: Name: Add Mods, Start Time: 09/03/2025 08:36:11 PM, Instructions: Please add any appropriate modifications and then approve the project., Expected Duration: 0.0, and Your Role: Project Manager. Below this, there are two columns for 'Approve' and 'Reject'. The 'Approve' column has a text area for 'Approval Comments' and a red-bordered 'Approve' button. The 'Reject' column has a text area for 'Reject Comments', a red-bordered 'Reject' button, and a 'Back to' search field. At the bottom, there are links for 'Approval Steps', 'Approval Role Users', and a 'More' button. A 'Close' button is in the bottom right corner.

Interacting With Approval Workflows

- After approval or rejection, the initial user receives an email saying the workflow is complete.
- At any time, the History of Approval tab on the Approval subtask will show who approved and when, even after the workflow is complete.

The screenshot displays a web interface for an 'Approval' workflow. At the top, the title 'Approval' is shown with a close button. Below it, the 'Approval Workflow' section contains fields for 'Name' (set to 'Initial Mod Setup'), 'Revision', 'Start User', and 'Start Time'. The 'History of Approval' section is expanded, showing a timeline of events: 'START Case #6 on 09/03/2025 08:36:11', followed by 'ACTIVITY: Add Mods on Modifications' which started at the same time, was assigned to the Project Manager, and approved by '19105.AARON.WILSON' on '09/03/2025 09:25:13'. This activity then triggered a 'NOTIFY: Notify PM. Role Project Manager' event, which finished at '09/03/2025 09:25:13'.

Approval Workflow	
Name	Initial Mod Setup
Revision	
Start User	
Start Time	

History of Approval	
▶	START Case #6 on 09/03/2025 08:36:11
↳	ACTIVITY: Add Mods on Modifications
	Started on 09/03/2025 08:36:11
	Assigned to Project Manager
	Approved by 19105.AARON.WILSON on 09/03/2025 09:25:13
↳	NOTIFY: Notify PM. Role Project Manager
↳	FINISHED on 09/03/2025 09:25:13

Interacting With Approval Workflows

- The color of the Approval button indicates the overall status of the workflow.
 - Clear – No workflow has been initiated
 - Gold – Workflow is in progress
 - Green – Workflow has been approved and is complete
 - Red – Workflow has been rejected and is complete



Interacting With Approval Workflows

- Workflow configuration options include:
 - The email may allow approval and rejection without clicking the application link or logging into Costpoint.
 - Relevant information from the workflow process may be included in the email, such as project ID or modification amounts.
 - Approval steps may be set to will escalate automatically to another person after a set amount of time has elapsed.
- This is not an exhaustive list.

Managing Workflow Cases

- Once a workflow has been started, it is assigned a case number.
- The Manage Approval Workflow Case Status application can be used to review the current state of any pending, completed, or rejected cases.
- It can also be used to reset the workflow to the beginning or to redirect a case to another user.

Managing Workflow Cases

Costpoint

ExecuteActionsRefreshSavePin

CO 1 - FULL PAYROLL

User Icon

Manage Approval Workflow Case Status

Save Criteria

Selection Ranges

Approval Workflow Model*OneStartInitial Mod SetupEnd

Approval Workflow Start Date*All

Approval Workflow Completion Date*All

Approval Workflow Case Status

☒ In Process☒ Completed☐ Rejected

Currently Assigned User*All

Approving or Rejecting User*All

Case Actions

☒ Send Reminder to Currently Assigned Role

☐ Escalate Pending Activity(ies)

☐ Delegate Pending Activity(ies) to User:

☐ Reject Approval Case(s) to Beginning

☐ Reject Approval Case to Activity:

Reject Code

Reject Notes

Submit Case Action

Approval Workflow Case Details

DeleteQuery

Approval Case	Approval Screen	Approval Workflow Model Name	Rev	Application Screen Name	Status	Currently Assigned Role	Start Time	Start User	Complete Time	Reject Code	Reject User
6	Open	Initial Mod Setup	0	PJMBASIC	Completed		09/03/2025 08:36:11 PM	19105.AARON.WILSON	09/03/2025 09:25:13 PM		

Case Log

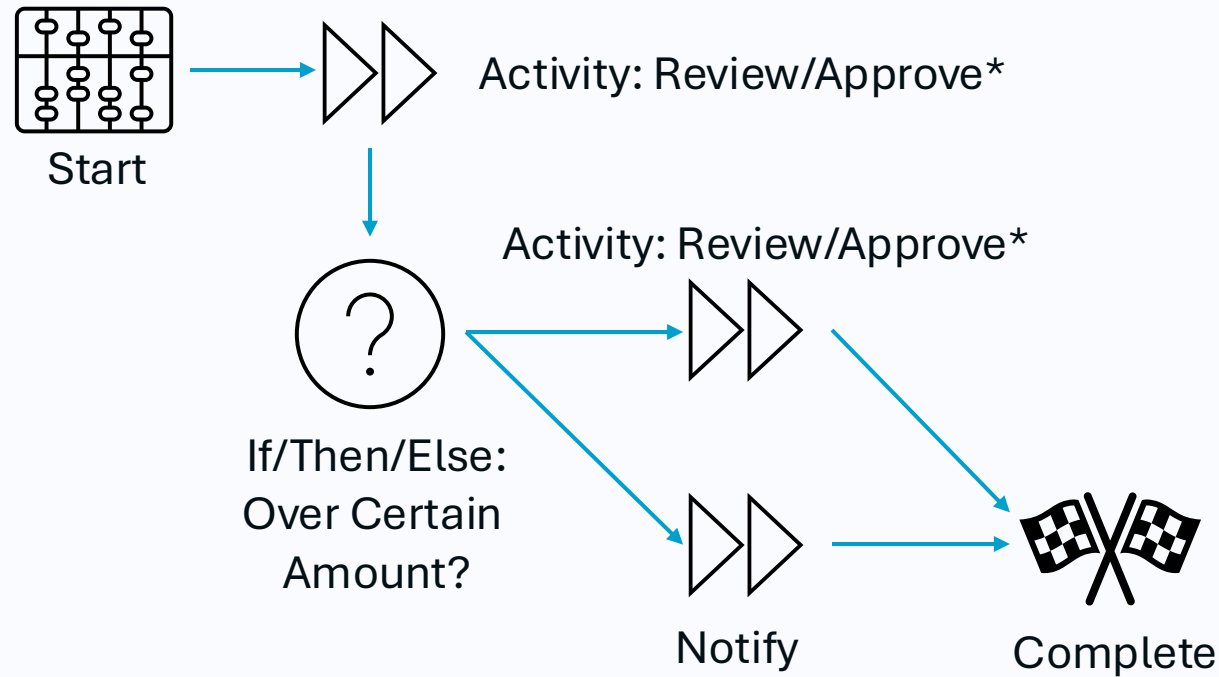
Case Field Values

More

Anatomy of an Approval Workflow

- A workflow consists of an overarching model and a series of nodes that perform some function in the workflow.
- Node types:
 - **Activity** – Require approval, optionally perform data updates
 - **If/Then/Else** – Evaluate criteria to determine the proper next step
 - **Notify** – Send an informational email to a user
 - **Group** – Define parallel approval scenarios

Anatomy of an Approval Workflow



* Tied To Specific Application

Anatomy of an Approval Workflow

- The Approval Workflow Models application allows the creation, modification, and testing of new workflows.
- The type and sequence of the nodes is presented graphically in the Approval Flow Structure box.

The screenshot displays the 'Approval Workflow Models' application interface. At the top, there's a header bar with a title 'Approval Wo...' and buttons for 'New', 'Copy', and 'Delete'. A status indicator shows '2 of 4 Existing' with navigation arrows. A 'Query' dropdown and window controls are also present.

Below the header, the 'Workflow Name*' field is set to 'Initial Mod Setup', with a 'Revision' of 0. There are checkboxes for 'Test Mode' (checked) and 'Active' (unchecked), with an 'Activate' button. Other fields include 'Start Role', 'Company', 'Email Text' (set to 'DEFAULT'), 'Total Time Allowed (Hours)' (0.0), 'Require Code for Rejection' (unchecked), 'Pending or Completed Cases' (0), and 'Pending or Completed Test Cases' (1).

The 'Approval Flow Structure' section shows a hierarchical flowchart:

- ▶ START
 - ↳ (0/1) ACTIVITY: Add Mods on PJMMOD - Role: Project Manager, Duration: unlimited
 - ↳ NOTIFY: Notify PM. Role Project Manager
 - ↳ FINISH: FINISH

At the bottom, there are tabs for 'Approval Entry Fields', 'Application Screens', and 'Approval Workflow Owners', along with a 'More' button.

Applications & Result Sets

- Applications often consist of several areas on the screen:
 - Main or header area
 - Detail area, usually below the header area
 - One or more subtasks which may be open or closed
- Each area is “powered” by separate result set.
- Every field, checkbox, button, etc. within an area or subtask is a member of the corresponding result set.

Applications & Result Sets

Costpoint

Actions Save

CO 1 - FULL PAYROLL

Manage Pro...

New Copy

Find

Query

Project * 700000.1.0.0001.0001AA-AA

Name * FFP Labor ACRN BY

Abbreviation

Level 6

Load Defaults

Primary Definitions

Basic Info Details

Classification

Project Classification DIRECT Project

Project Type T&M

Export Project * Time & Expense Project

Billable Project

Apply Cost of Money Rates

Charging

Active

Allow Charging

Account Group DIR

Limit

Accounts

Organizations

Accounts to P/O/A

Controls

Owning Org 10.10.0500

Default to Owning Organization

Project Workforce Required

Use Top Level Workforce

Apply Salary Cap

Salary Cap Code

ACRN Options

ACRN Warnings With Modifications

Project Roles

Modifications

Revenue Information

Proj Bill Info

More

Modifications

New Copy Delete Query

Modification ID

Modification Description *

Contract Modification ID

Contract ID

Contract Name

Subcontr

0001

Initial Contract - Internal Re

NG7208Y5783

Korea Equip Maintenance

0000

Initial Contract

NG7208Y5783

Korea Equip Maintenance

Set Defaults

Award Fee

Unit Info

Notes

More

Close

Revenue Inform...

New Copy Delete

1 of 1 New

Query

Revenue Formula

NONE

Do Not Compute

Fiscal Year

Calculate Revenue on Units

ITDCPFC - Other Fee on Revenue Level

Do Not Redistribute

Post Revenue to the

Owning Organization

Performing Organization

Discount Method

None

Allow Revenue to Exceed Value

By How Much ?

Goal Multiplier

Labor 1.0000

Non-Labor 1.0000

Award Fee

Revenue Adjustments

More

Close

Each of these are distinct but related result sets

Applications & Result Sets

- When a workflow is connected to an application, it is tied to one result set within that application.
- This allows an approval workflow to apply to any of these areas (header, details, or subtask) independent of the other areas.
- An approval workflow model could be designed that would require individual PO lines to be approved/rejected.

Routing, Roles, & Role Filters

- Routing of approval workflow cases is based on roles, such as project manager, buyer, AP clerk, etc.
- Employees are assigned to each role that is used by a workflow.
 - For example, if three people are assigned to the AP clerk role, all three people would be notified when a workflow needs their approval.
- Role filters can ensure that only the appropriate person assigned to a role receives the notification.

Routing, Roles, & Role Filters

Role Users

NewCopy ▼DeleteQuery ▼

<input checked="" type="checkbox"/>	User / User Group *
	19105.AARON.WILSON
	19105.JESSE.KEPNER

Role Filtering ConditionsMore

Close

Role Filtering Conditions

NewCopy ▼DeleteQuery ▼

<input checked="" type="checkbox"/>	Role Filter Field Name *	Operator *	Data Type	Text Value	Date Value	Numeric Value
	HDR_TXT	contains (%like%) ▼	Text	DNU1		

Close

Leveraging Extensibility With Workflows

- Each step in the workflow model is assigned to one application.
- All routing decisions (if/then/else, role filters, etc.) are limited to using data that is shown within that application.
- But what if, for example, you need to route a purchase order based on the project account group of the default project in Manage Purchase Orders?

The answer is extensibility.

Leveraging Extensibility With Workflows



Extensibility is a way to expand the functionality of Costpoint to meet your business needs by:

- Adding new data fields to an application or changing how they look
- Creating new subtasks or even new applications
- Expanding the processing functions available in an application

In the end, 90% of extensibility development is modifying existing result sets to include new data or data from elsewhere in the system.

Leveraging Extensibility With Workflows

- In the previous example, I need to be able to route a PO based on the PAG of this project in Manage Purchase Orders

The screenshot displays the 'Manage Purchase Orders' application window. At the top, the 'Identification' section includes a 'Purchase Order ID' field with the value '100002' and a 'Release' dropdown set to '0'. Below this, a tabbed interface shows 'Accounting Defaults' as the active tab. The 'Project' field is highlighted with a red rectangular box and contains the alphanumeric string '700000.2.0.0004.0004AA.AB'. Other visible fields include 'Account', 'Organization' (with value '10.10.0500'), 'Ref No 1', and 'Ref No 2'. To the right, there are fields for 'T&M Labor ACRN BY' and 'CO 10 Direct'. At the bottom of the form, there are links for 'Header SOW', 'Header Notes', 'Header Text', and a 'More' button.

Leveraging Extensibility With Workflows

- To accomplish this, we use extensibility to create a new link between the PO header result set and the project data in the database.
- Once complete, the workflow model developer will see the PAG field as an available field to use in filters and if/then/else conditions.
- Assuming you have access to extensibility development in your environment, this enhancement might take 1 hour.

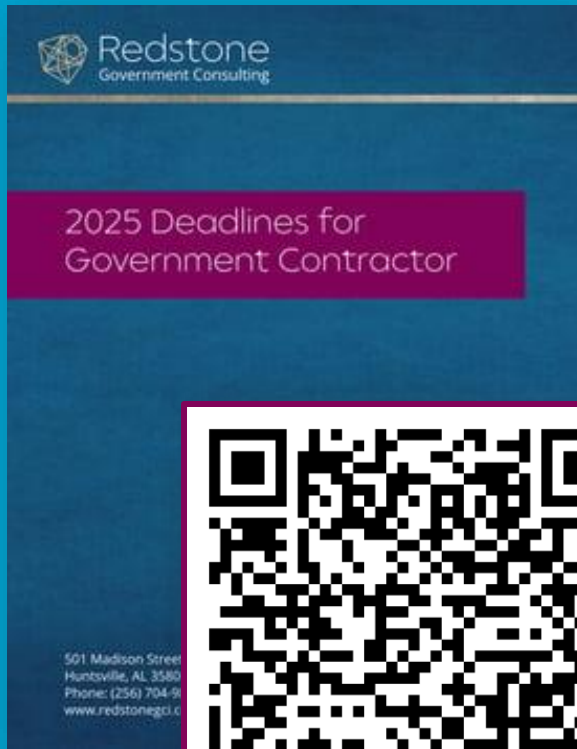
Questions and Discussion



2025 Critical Deadlines for Government Contractors

This guide provides you with all of the essential information and dates you need to know, including:

- Important deadlines for your internal departments
 - Accounting,
 - Human Resources,
 - Contracts & Subcontracts, and
 - Government Compliance
- Contract performance and delivery deadlines
- Deadlines for reporting and compliance requirements
- Deadlines for audits and reviews



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