

Deltek Content Management Functionality

Overview

The primary goal of Costpoint CMI is to provide access to the CMS (Content Management System) from within Costpoint application screens. Access means the ability to:

- View content
- View and change content properties (metadata)
- Associate (or link) content files to Costpoint records
- Upload files to CMS

Linking is done at the business entity level. For example, a specific Costpoint voucher is linked to the image of the scanned invoice. Regardless of the Costpoint application screen that processes or views the voucher, the CMS invoice image is always visible and accessible after the link is created.

Costpoint CMI functionality is fully configurable. It is not activated for any Costpoint application by default but can be activated for most applications.

Costpoint CMI supports all editions of Microsoft® SharePoint® 2007, 2010, 2013, 2016, and SharePoint in Office 365, using a native SharePoint Web services API.

CMI Licensing

A Content Management Integration license is required in order to configure and use Costpoint CMI.

Functional Overview

Once enabled and configured, CMI brings the following features and functionalities to Costpoint applications:

- Link a document in Costpoint with a document in the CMS (for example, link a voucher to a scanned image of an invoice).
- Pre-populate Costpoint documents based on scanned documents in the CMS (for example, pre-populate a new voucher with data extracted by Optical Character Recognition from a scanned invoice).
- Change CMS document metadata or synchronize it with Costpoint document fields.
- View linked CMS documents from within Costpoint. o Linked CMS documents stay attached to a Costpoint document as it is processed through various applications (for example, the link for an attached invoice will be preserved when you post an invoice and will be available through the Voucher History application).
- Use the CMS as a replacement for shared network folders:
- Print from Costpoint directly to the CMS.
- Point Costpoint pre-processors and interfaces directly to documents in the CMS.