Deltek.

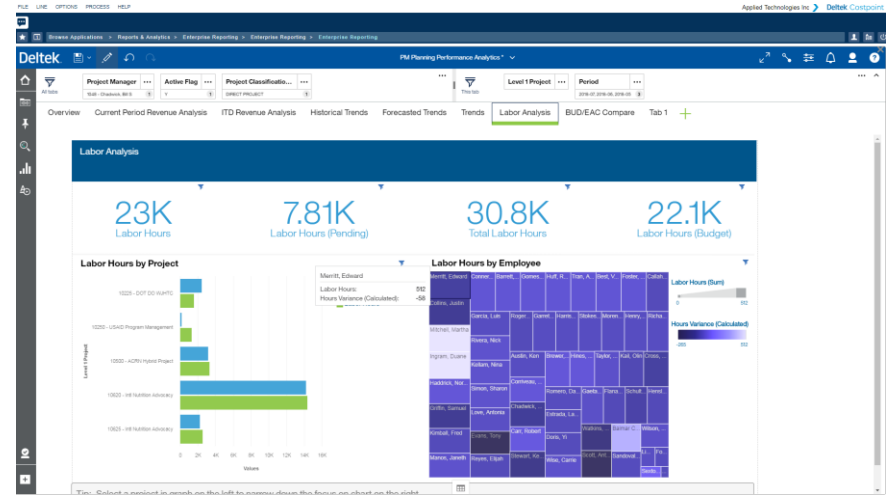# What to Know about Upgrading to Costpoint Enterprise Reporting 7.2.1

Cloud Customer Information
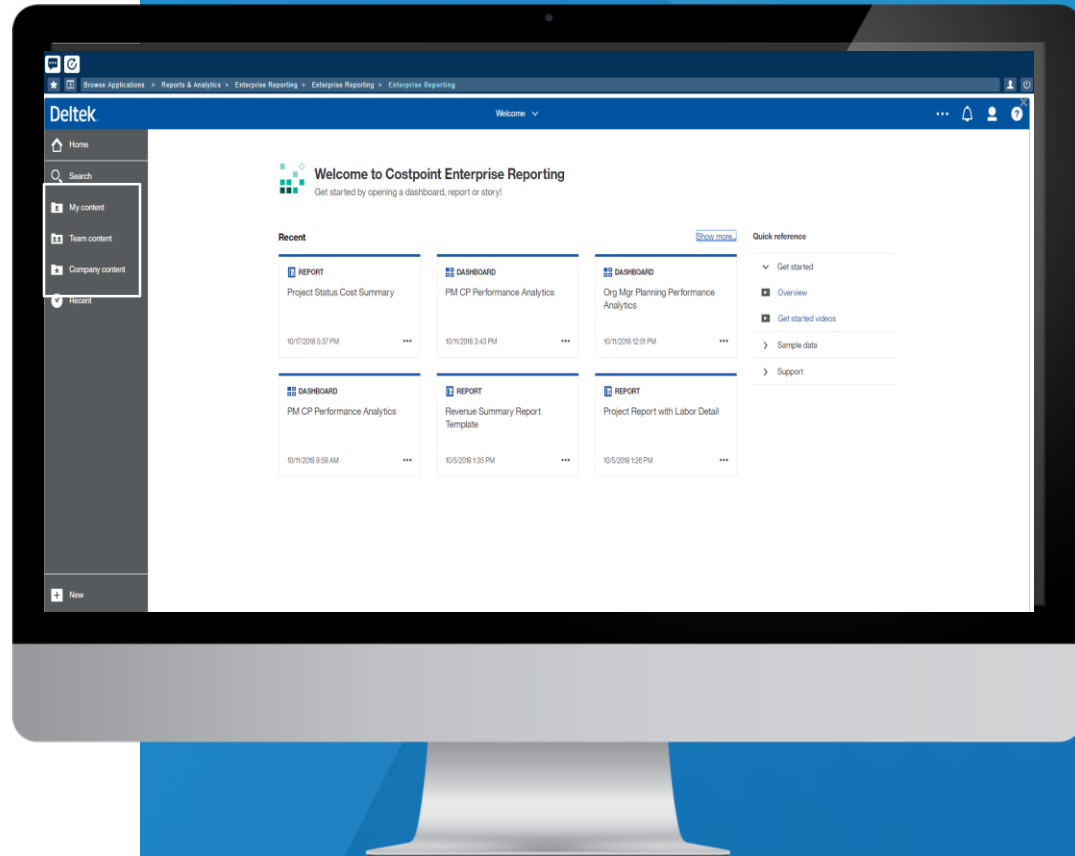February 2019

Benefits of the upgrade

» Self-Service BI for Everyone!

» New, Intuitive User Interface

  » Easy to access content

  » One authoring environment

» Dashboard Analytics

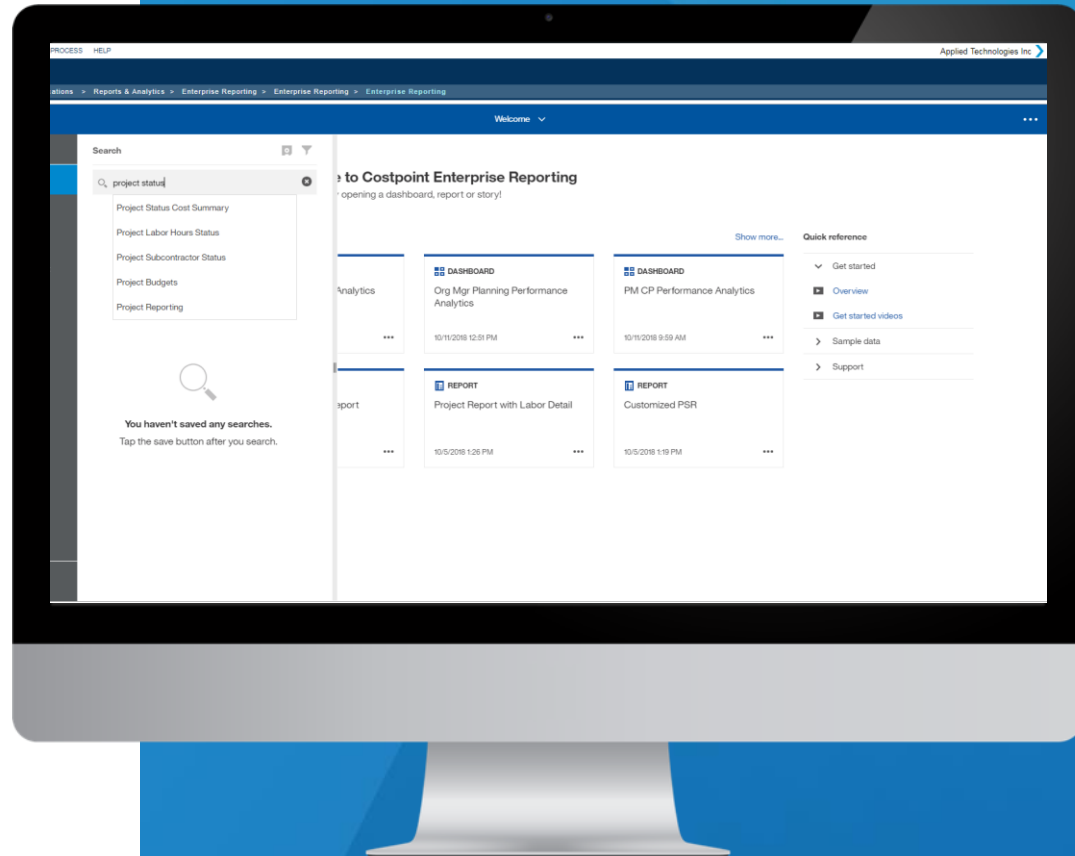» New BI Content and Models

» Data Module

» Integrated Security Model

New User Interface

» My Content-Personal Saved Content

» Team Content-Deltek Provided Content-Access Determined with Security

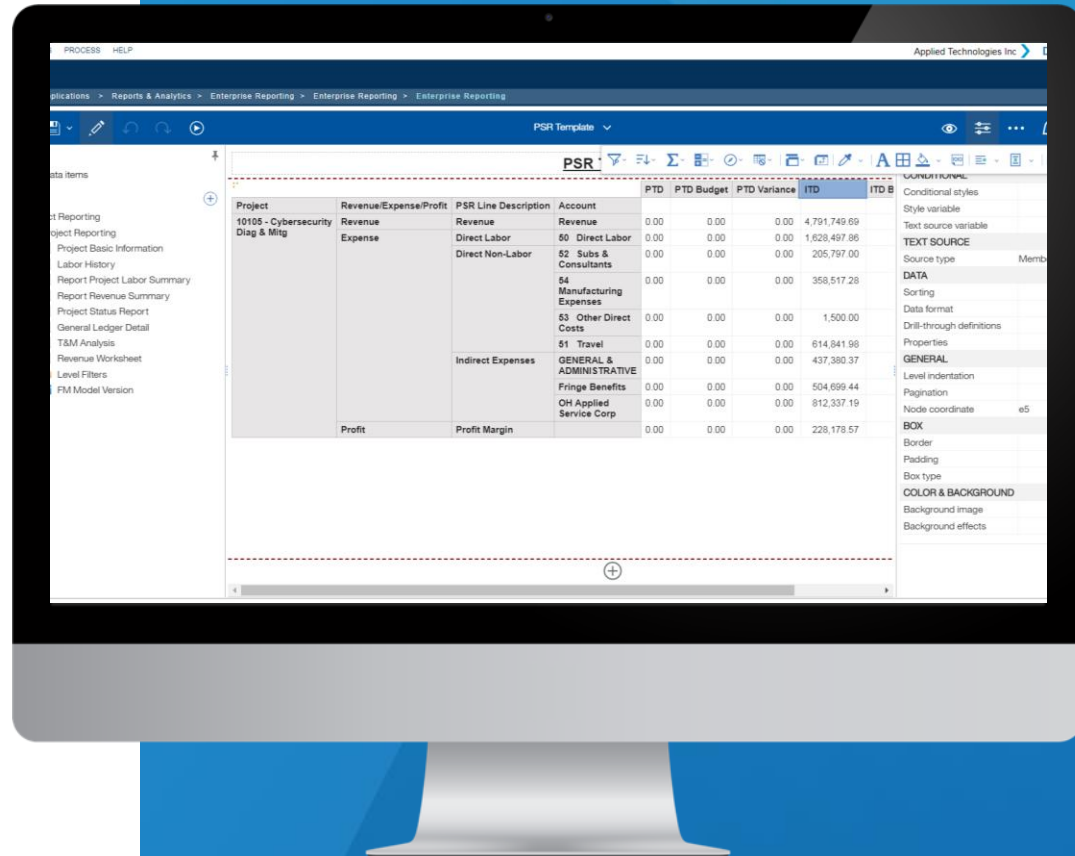» Company Content-Create your own folder structure giving access to only the content you want others to see

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Navigating Content

» Search across all the content, filtering only what you want to find
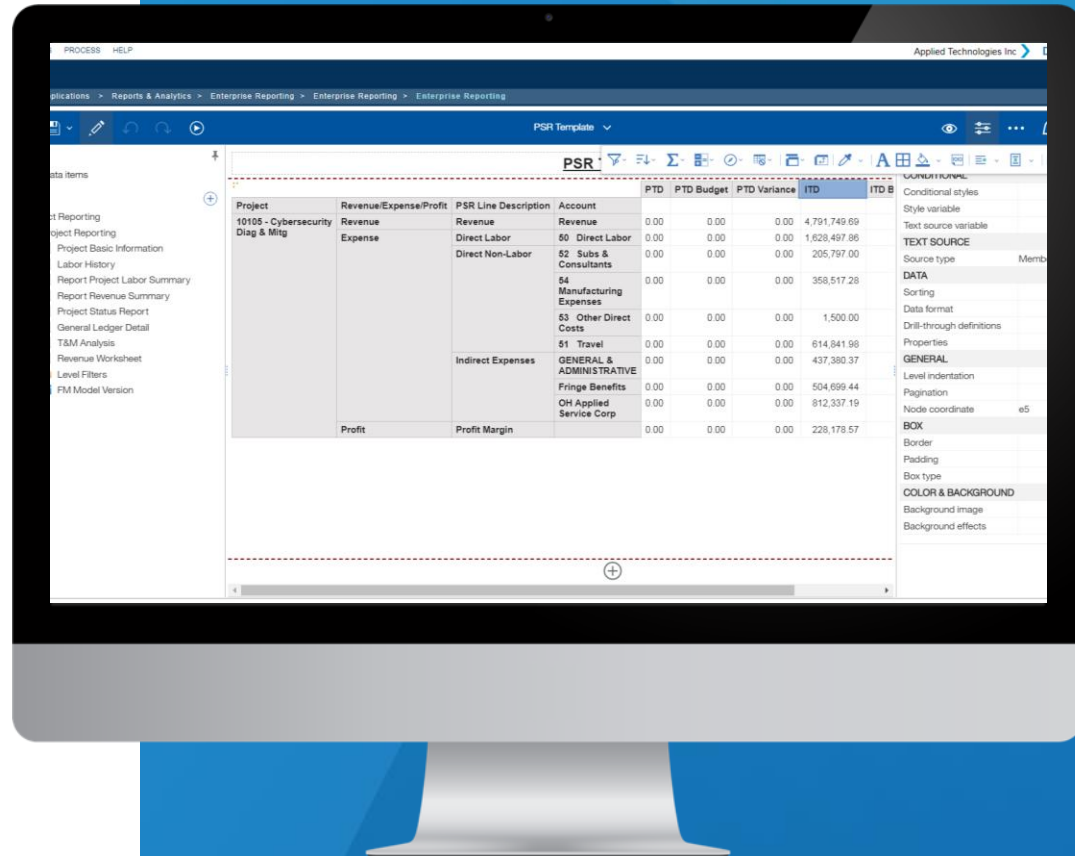
» Toggle between open reports

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Single Authoring Environment

» Combines functionality of Report Studio, Workspace Advanced and Query Studio into a single environment

5
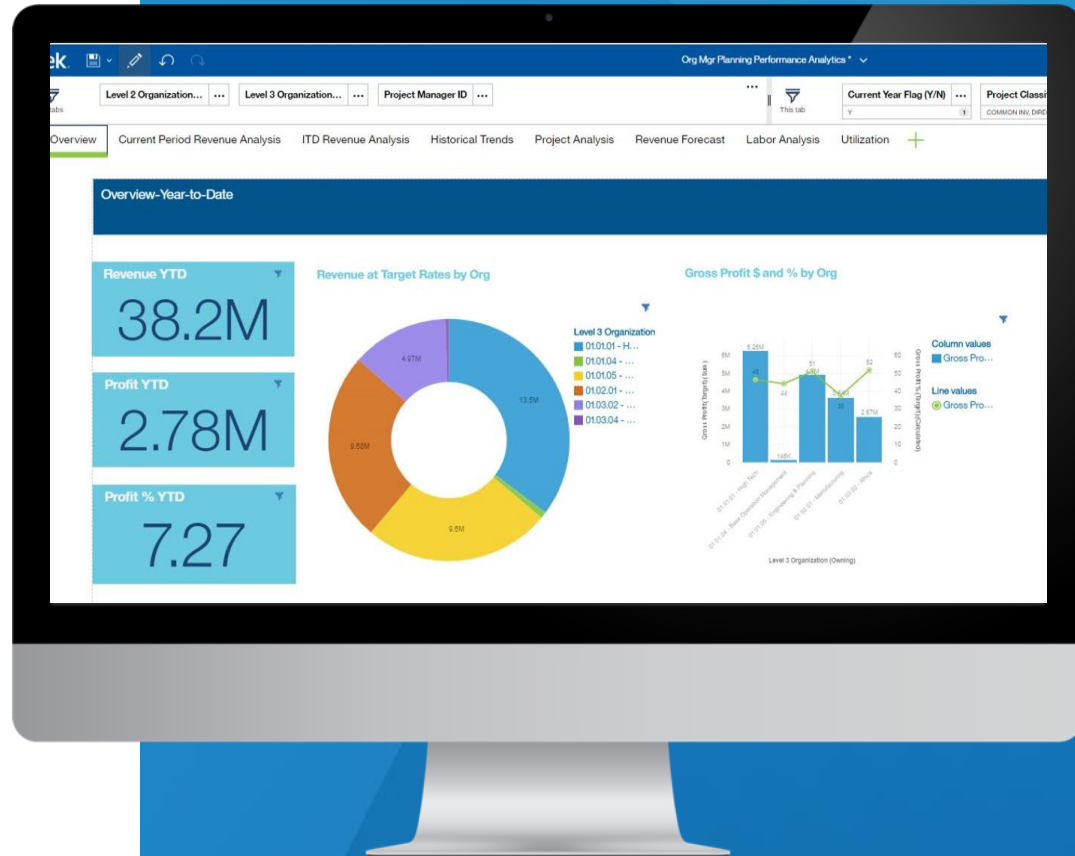
Single Authoring Environment

» Preview reports as you are authoring them

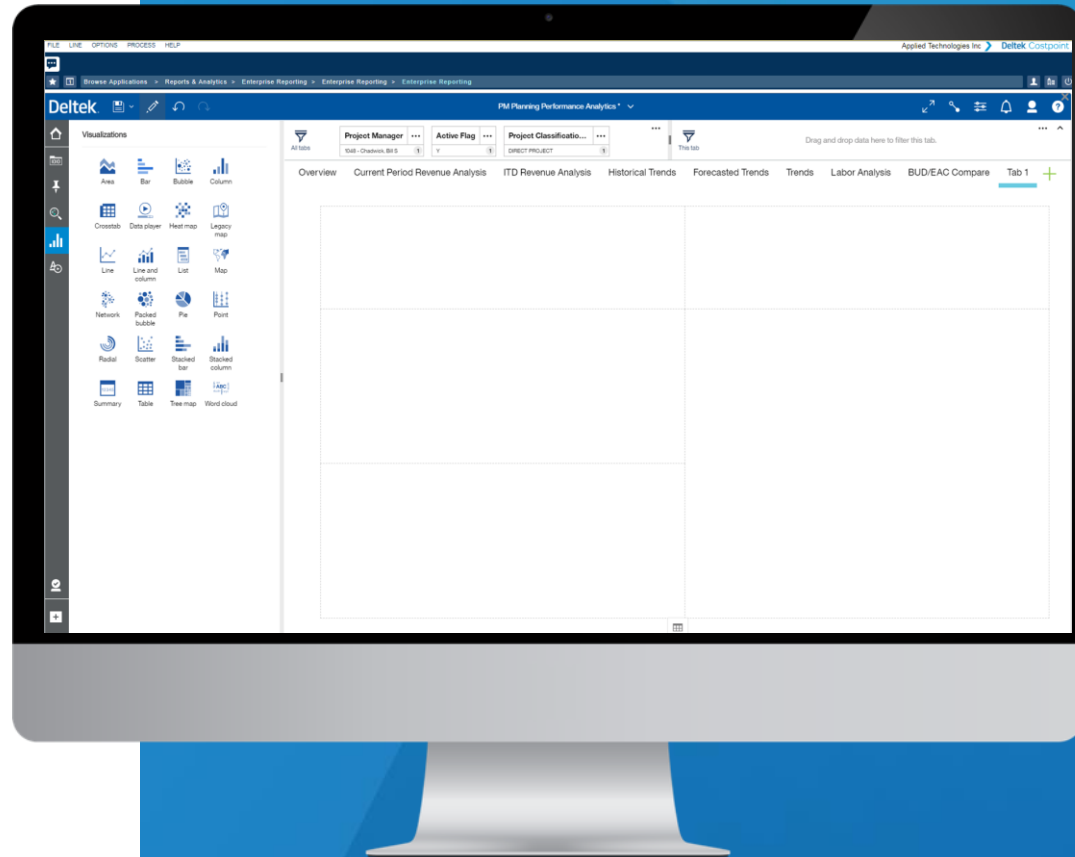Deltek.

Dashboards

» Pre-built Interactive Dashboards are provided

» Easy to create your own Dashboards

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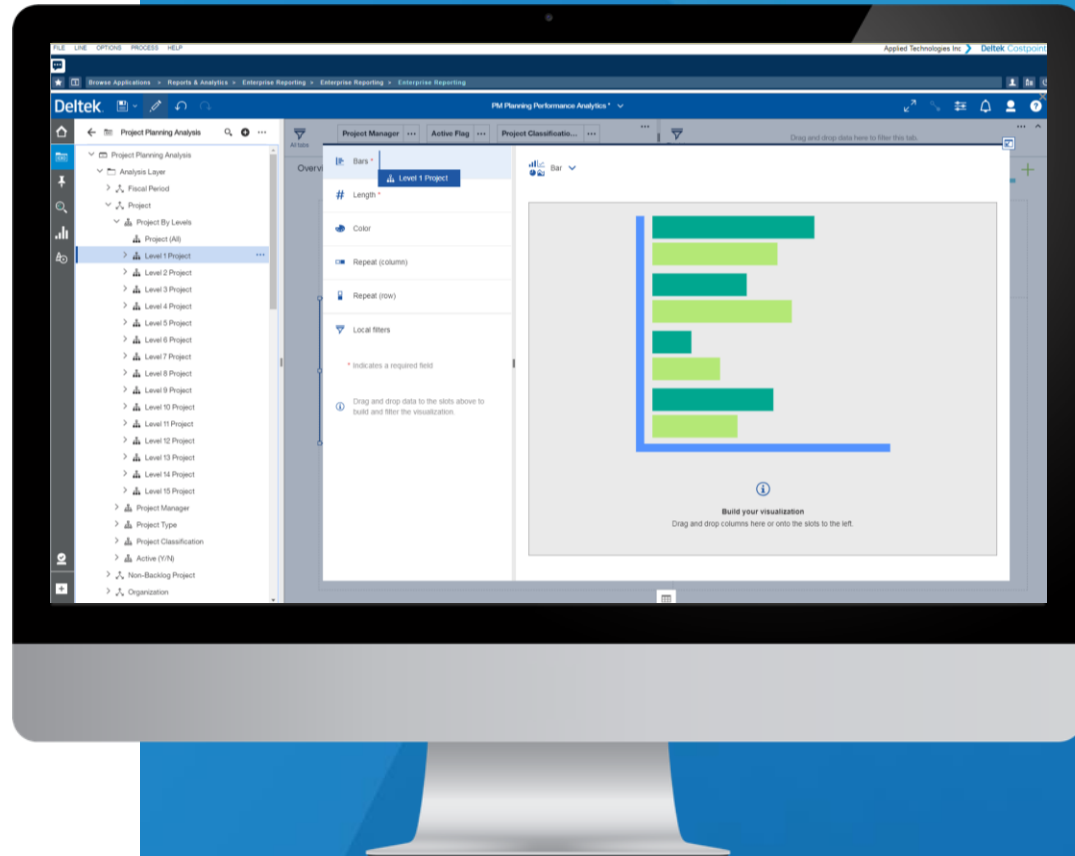# Dashboard Authoring

» Will suggest visualizations to use for specific data or you can select from the list of visualizations
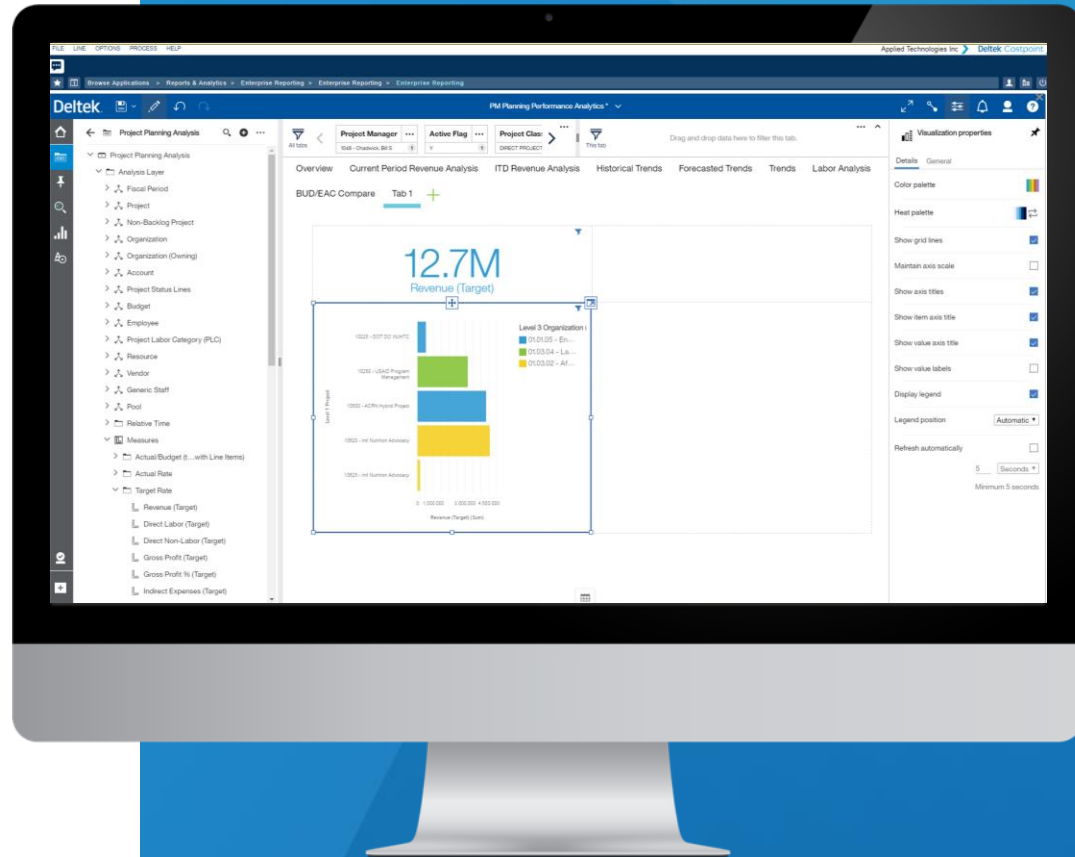
Dashboard Authoring

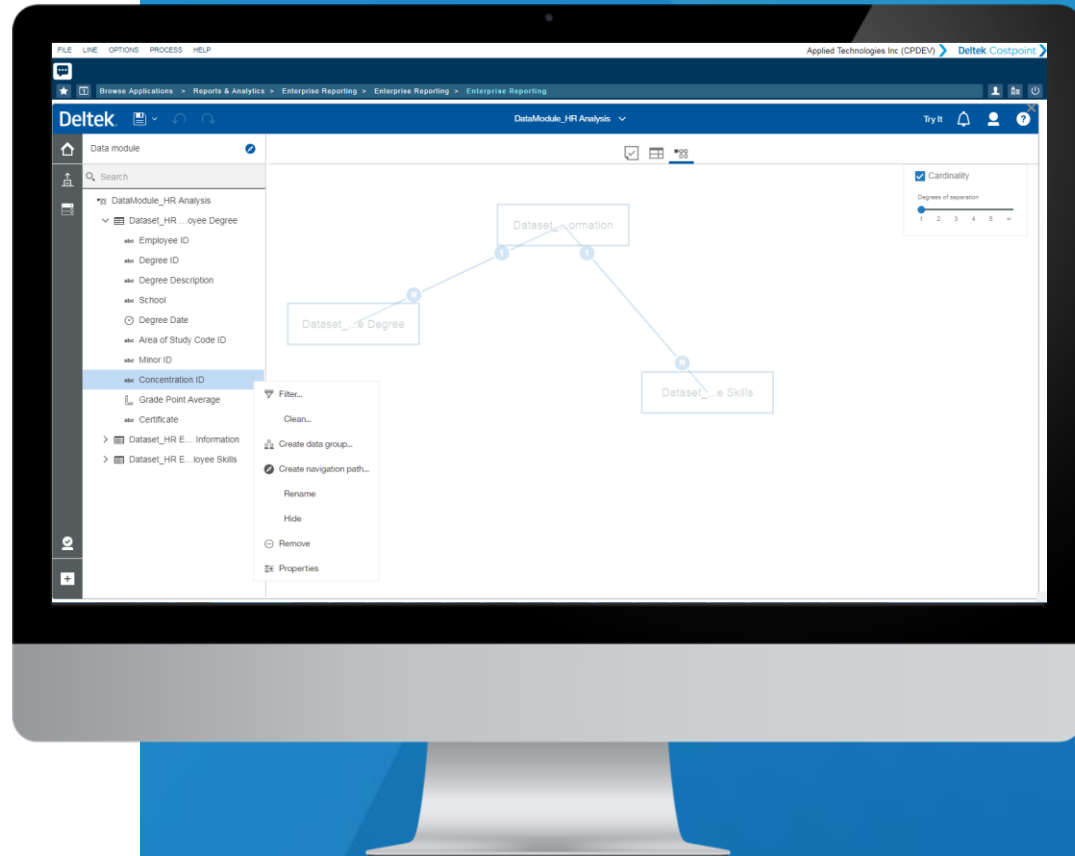» Drag and drop data fields into the visualization

Report Authoring

» On screen rendering of dashboards as you create them

Data Module

» Browser based data design tool

» Great for creating quick model to use with dashboards

CER Security Groups

» Costpoint now includes standard user groups that are utilized to secure CER capabilities, objects and data.

| ★ | 1 | Browse Applications > Admin > Security > System Security > Manage User Groups |

User Groups

✓	User Group ID *	Name *	
	CER__ACCTG	CER Accounting	
	CER__ADMIN	CER Cloud Administrator	
	CER__ADV	CER Advanced User	
	CER__CONSUMER	CER Consumer	
	CER__CP_ADMIN	CER CP Administrator	
	CER__DEV	CER Developer	

Types of Security

» **Object Security:** Determines who can access the what Deltek content (folders, packages, reports, and dashboards). Applies to all content.

» **Product Capabilities Security:** Determines who can access which features or capabilities of the Cognos product based on our licensing structure. Applies to all.

» **Data Security:** Security derived from Costpoint, includes Organization, Labor Suppression and Project Manager

Note: Steps are outlined in the "CER Cloud Set-up Guide"

Easier to Manage User Licenses!

» CER groups are used to manage software **capabilities** based on the types of software licenses purchased.

Component	Consumer*	CER User **	Advanced CER User	CER Developer	Web Admin	CER/BI Admin
Interactive Viewer	X	X	X	X		X
Dashboards (View and Author)		X	X	X		X
Interactive Report Authoring			X	X		X
Data Module			X	X		X
Framework Manager				X		X
Administration Console					X	X

* Consumers are a type of CER user that you can assign with limited capabilities to only run reports

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Overview of Cloud Setup

CER Configuration	▪ Enable/Disable Data Level Security ▪ Set Current Period
User Setup	▪ Capabilities ▪ Object ▪ Data Level (Org, Project, Labor Suppression)
Company Content Folder	▪ Organize your own content, control access to report consumers, add custom reports