

Deltek

Deltek Costpoint®  
Planning 8.1  
Post Installation Configuration Guide

**April 5, 2022**

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## About this Guide

Welcome to the Costpoint Planning 8.1 Configuration Guide for New Customers.

This guide describes initial configuration tasks for new Costpoint Planning installations and is intended for System Administrators. These tasks should be completed after Costpoint Planning 8.1 is fully installed but before users access the software.

The configuration tasks described in this guide will be implemented by Costpoint Planning System Administrators. However, some of the processes described will require advance input from other groups within your company, such as Accounting and Project groups, and may also require additional advice from outside consultants. Where such cases exist, they are noted.

## Prerequisite

Before you can complete the procedures described in this guide, the Planning database must be installed on the same server as the Costpoint database(s).

## Overview

The following list provides a brief overview of the procedures required to complete the post-installation configuration of Costpoint Planning. Each of these is described in detail within this document:

- **Step 1: Activate Administration Rights**

**Notes:**

- If you are a Deltek Cloud customer, proceed to section, "[Step 1 \(Cloud\): Activate Administration Rights.](#)"
- If you have an on-premise installation of Costpoint Planning, proceed to section, "[Step 1 \(On-Prem\): Activate Administration Rights.](#)"

- **Step 2: Post Install Setup**

During the post-installation setup, you will do the following:

- [Configure Settings](#)
  - [Maintain Account Mapping](#)
  - [Finalize Setup](#)
- **Step 3: Set Up the Refresh Process:** Set up scheduled jobs, entailing the following:
    - [Create Refresh Job Parameters](#)
    - [Create a Job ID](#)
    - [Create a Job Queue](#)
    - [Create a Job Server](#)
    - [Add Job to the Queue](#)
    - [Assign Queue to Job Server](#)
  - **Step 4: Run a Manual Refresh**
  - **Step 5: Add Users to Costpoint**
  - **Step 6: Assign Users to Costpoint Planning User Groups:** Set up groups of applications which will be accessible to users.
  - **Step 7: Enable User Security and Licensing Options:** Set licensing and security options specific to Costpoint Planning for each user.
  - **Step 8: Validate Data:** Compare report data in Costpoint Planning with Costpoint to confirm results.

## □ Step 1 (Cloud): Activate Administration Rights

**Note:** If you have an on-premise installation of Costpoint Planning, skip to the next section: [“Step 1 \(On-Prem\): Activate Administration Rights.”](#)

If you are a Deltek Cloud customer, complete the steps described in this section.

**To activate your Costpoint Administration rights:**

1. Log on to Costpoint using your Costpoint **Username**.

2. Create a **User Group** (for example, **BNP\_Admin**) that has rights to all the screens in **Costpoint Planning**, and then assign to that user group the **Planning Administrator** who is performing the post-installation configuration steps.

**Note:** You will perform this step from **Planning » Administration » System Security » Manage User Groups**. Detailed information about this screen is available from within the online help. After you open the Manage Users Groups screen, click Help on the Costpoint Help menu for more information.

3. Assign license rights to the Planning Administrator:
  - a. Click **Planning » Administration » System Security » User Maintenance**.
  - b. In the row that displays the User ID of the Planning Administrator, select the **Active** check box.
  - c. From the **License Type** drop-down list, select **Full**, if it is not already selected.

User ID	User Name	Employee	Active	License Type	Security Org ID	Home Org ID
ADMIN			<input checked="" type="checkbox"/>	Full	ALL	1.1.1

- d. Click .

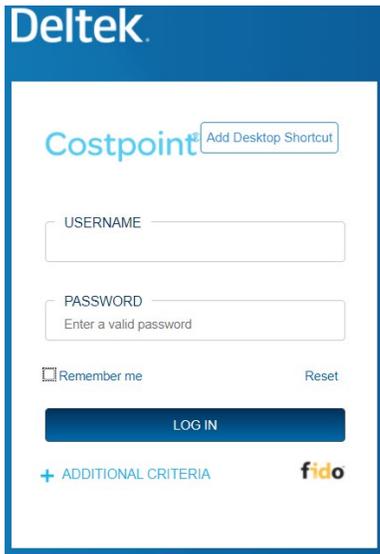
## □ Step 1 (On-Prem): Activate Administration Rights

**Note:** If you are a Deltek Cloud customer, refer to the previous section: [“Step 1 \(Cloud\): Activate Administration Rights.”](#)

If you have an on-premise installation of Costpoint Planning, complete the steps described in this section.

### To activate your Costpoint Administration Rights:

1. Log on to Costpoint as **CPSUPERUSER**.



2. Click **Planning » Administration » System Security » User Maintenance**.
3. In the **User Maintenance** screen, select the **Active** check box in the row that displays the **ADMIN ID**.
4. From the **License Type** drop-down list, select **Full**, if it is not already selected.
5. Click .

## □ Step 2: Run the Post-Install Setup Wizard

The Post-Install Setup utility is wizard application where you will import data, basic account mapping, and configure your Costpoint Planning installation.

### Wizard Overview

The following is an overview of the type of information that is completed in each wizard screen:

- **Configuration Settings:** This step of the wizard contains six separate tabs for configuring account levels, display, and reporting, as well as Org and Project.

Decisions regarding how to set each option will require advance input from personnel within your company, who may also require advice from outside consultants.

The note below includes a link to the “Costpoint Planning 8.1 Configuration Settings Worksheet.” This document includes descriptions and notes for each configuration setting, and also includes a column where the decision is indicated.

The Worksheet also includes key section that provides additional, critical background on the new Org Budget Revenue Calculation setting. This setting affects all Organization Budgets. Decisions regarding this setting must be carefully considered, because switching methods later would be an involved process, which may require Customer Care assistance.

Since access to the Configuration Settings screen is limited to System Administrators, you will refer to the completed document when choosing the settings.

**Note:** [Costpoint Planning 8.1 Configuration Settings Worksheet](#)

Click the above link to download the document and personally distribute to Accounting personnel and other decision-makers, or right-click the link and select **Copy Link Location** to distribute the link itself.

The document includes a Decision column, where the choice for each setting should be indicated before the document is returned to you.

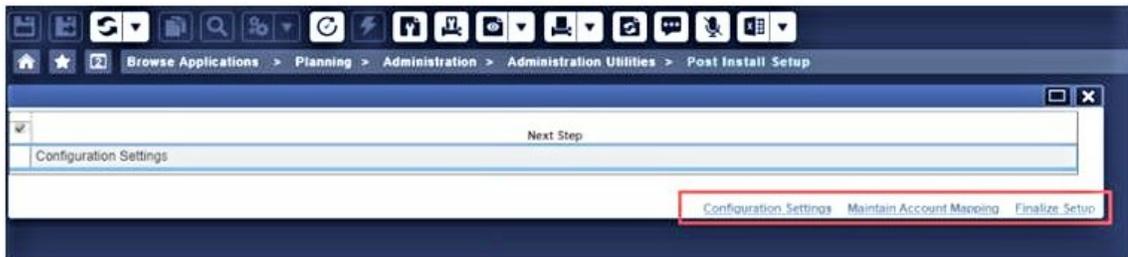
- **Maintain Account Mapping:** This screen displays the results of the account mapping. Note, however, that the results can be validated by Accounting later from **Planning » Administration » Administration Controls » Maintain Account Mapping**. Verify the results and edit if necessary.
- **Finalize Setup:** On this final step, click **Finish** to complete the synchronization process.

## Open the Post Install Setup Utility

To start the set-up wizard:

1. Click **Planning » Administration » Administration Utilities » Post Install Setup**.

The Post Install Setup screen displays the next step of the wizard. Click the subtask link that matches the text in the **Next Step** field to continue through the wizard.

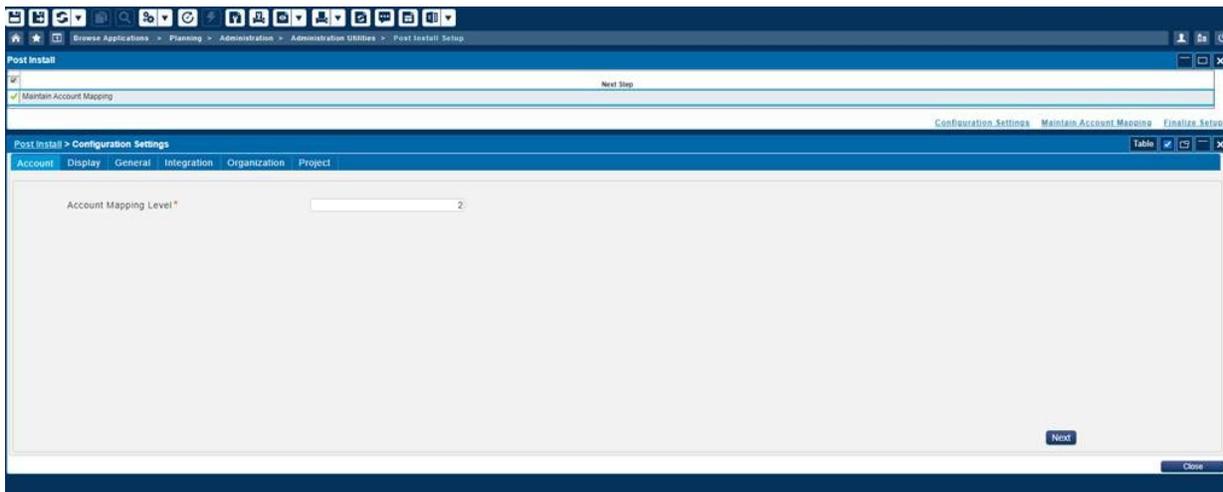


2. Click **Configuration Settings** to continue to the first step.

**Note:** You can also stop the post installation setup at any step and later resume where you left off. If you go back to a previous step to make changes, the configuration setup will begin from that point, and you will be required to complete the remaining steps.

## Implement Configuration Settings

This step of the wizard requires you to complete fields on six separate tabs. Refer to the completed “Configuration Settings Worksheet” when choosing settings in this part of the wizard.

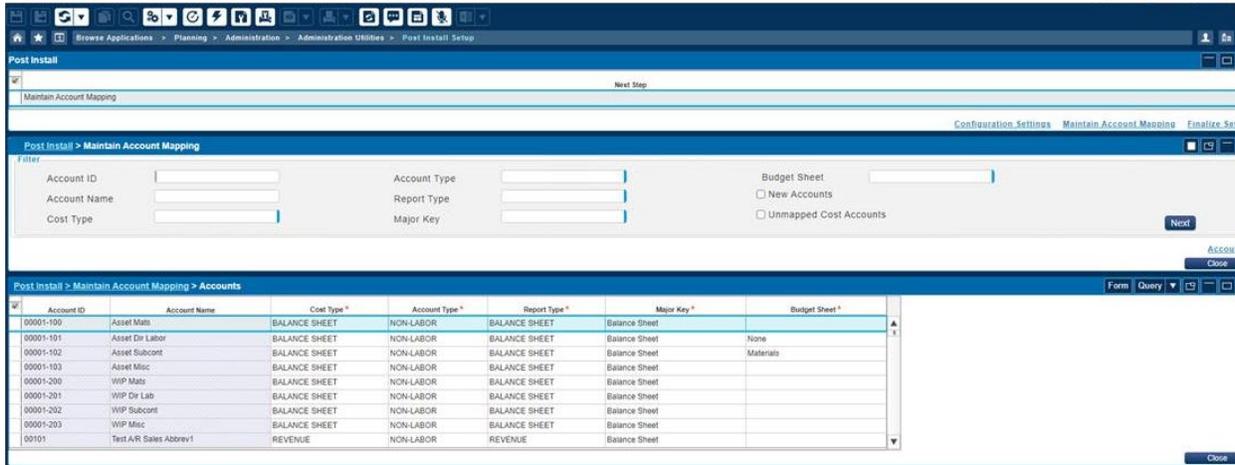


**Note:** The Post-Installation Utility can be run only one time. If you later need to change settings described in this step of the utility, click **Planning » Administration » Administration Controls » Configuration Settings**.

Step 2: Run the Post-Install Setup Wizard

## Verify Account Mapping

In this step of the wizard, you will verify that the accounts imported in the previous step are mapping correctly. Use the Maintain Account Mapping screen to maintain system rules for the treatment of G/L accounts.



Depending on the field, you can enter or select which cost type, account type, report type, budget sheet, and major key an account is assigned to.

This grid displays all summary level accounts only and maps the accounts to the report types for reporting purposes. Most of the accounts will be set up correctly from your accounting system, but Deltek recommends that you review and verify some of the accounts.

**Note:** This screen can be opened later from **Planning » Administration » Administration Controls » Maintain Account Mapping**.

### To verify and/or edit your account mappings:

1. On the **Maintain Account Mapping** form, complete the following fields to filter the display of account mappings:

Field	Description
<b>Account ID</b>	This field displays the account ID table.  Note that this will show the accounts at the level in which 'Configuration Settings / Account / Summary Account Level' has been set (unless the branch does not go down that low and then will show level higher in the tree).
<b>Account Name</b>	This field displays the account name of the Account ID.

Step 2: Run the Post-Install Setup Wizard

Field	Description
<b>Cost Type</b>	To change the Cost Type, click  and select from the following options: <ul style="list-style-type: none"> <li>▪ Direct</li> <li>▪ Indirect</li> <li>▪ Revenue</li> <li>▪ Balance Sheet</li> </ul>
<b>Account Type</b>	To change the Account Type, click  and select from the following options: <ul style="list-style-type: none"> <li>▪ Labor</li> <li>▪ Non Labor</li> <li>▪ PTO Fringe Labor</li> </ul>
<b>Report Type</b>	This field controls the visibility of components on reports. To change this option, click  and select from the list of available report types.
<b>Major Key</b>	Major Key provides a form of categorization for reporting. To change this option, click  and select from the list of Major Key descriptions.
<b>Budget Sheet</b>	The Budget Sheet is the Project Budget/EAC subtask for data entry. To change this option, click  on the budget tab. The chosen Budget Sheet controls the budget subtask account which is available for data entry.
<b>New Accounts</b>	Select this check box to limit the results to the new records that have been imported since the last time you reviewed them.
<b>Unmapped Cost Accounts</b>	Select this check box to display only the cost accounts that are not yet mapped.

2. Click **Execute** to populate the Accounts table.
3. In the **Accounts** table, modify the account mapping if needed.
4. Click .

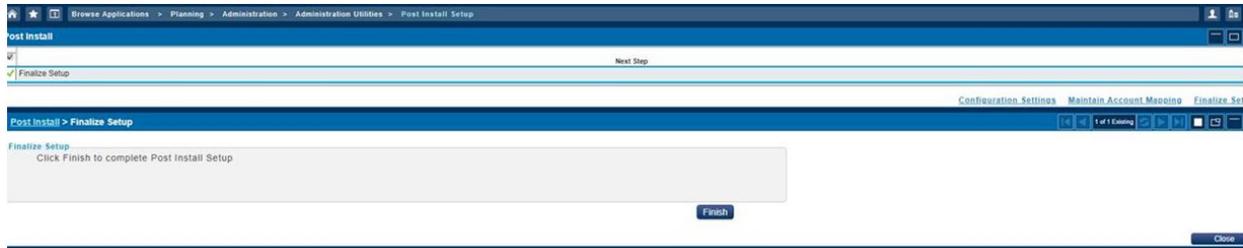
**Note:** If you make changes to this page and run the refresh process, the refresh process will only pull in new records from the accounting system.

5. Click **Next**.

Step 2: Run the Post-Install Setup Wizard

## Finalize Setup

On this final step, click **Finish** to complete the synchronization process between products.



When you click **Finish**, the remainder of the update process is completed. After it concludes, the **Post-Installation Setup Completed** box on the General tab is automatically selected.

## □ Step 3: Set Up the Report Table Update Process

In this step, you will set up the refresh process, which includes creating scheduled jobs.

The purpose of the refresh process is to bring in all of the new data to populate the following tables:

- Business Intelligence (BI) report tables
- Custom Report Tables
- Project Security Tables

The Costpoint Planning **Report Table Update Process** is generally run on a nightly basis via the Job Server.

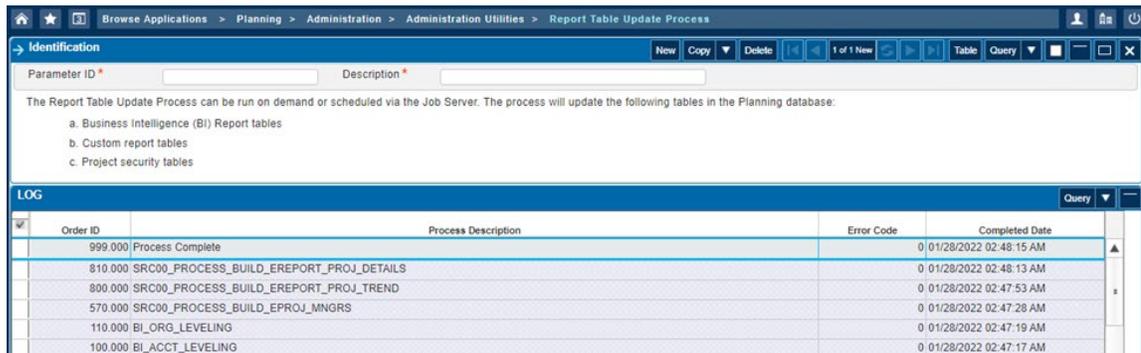
Setting up the update process requires six separate procedures performed in the following sequence:

1. Create refresh job parameters.
2. Create job ID.
3. Create a job queue.
4. Create a job server.
5. Add job to queue.
6. Assign queue to job server.

### Create Refresh Job Parameters

To create a job parameter:

1. Click **Planning » Administration » Administration Utilities » Report Table Update Process**.



2. On the **Report Table Update Process** screen, set the **Parameter ID** to **REFRESH**.
3. Set the **Description** to **Costpoint Planning Refresh Process**.
4. Click **Save & Continue**.
5. Exit the **Report Table Update Process** application.

## Create a Job ID

In this step, you will create the job that is associated with the application and parameter you saved in step 1 of the previous procedure ([Create Refresh Job Parameters](#)).

To create a job ID:

1. Click **Admin » Job Management » Job Management Codes » Manage Jobs**.

The screenshot shows the 'Manage Jobs' application window. The 'Identification' section has input fields for 'Job ID' and 'Description'. The 'Details' section includes radio buttons for 'On Application Failure' (Use Default, Halt, Continue) and a 'Default Priority' field set to 50. The 'Modification Information' section shows 'Creator' as CPSUPERUSER and creation/modification dates of 07/04/2018 04:06:18 AM. The 'Job Operations' section is a table with columns: Sequence, Module, Application, Application Name, Parameter, Parameter Description, and Process.

2. On the **Manage Jobs** screen, enter or select the following values.

Field	Field Value
<b>Job ID</b>	Enter <b>BNPREFRESH</b> .
<b>Description</b>	Enter <b>PLANNING REPORT REFRESH</b> .
<b>On Application Failure</b>	Select <b>Use Default</b> .
<b>Default Priority</b>	Enter <b>1</b>
<b>Job Operations</b>	<p>In the table, complete the following fields:</p> <ul style="list-style-type: none"> <li>▪ <b>Sequence:</b> Enter <b>1</b>.</li> <li>▪ <b>Module:</b> Enter <b>BA</b>.</li> <li>▪ <b>Application:</b> Enter <b>BNP_BAPREFRESH</b> or click  to select it.</li> <li>▪ <b>Parameter:</b> Enter <b>REFRESH</b> or click  to select it from Lookup.</li> <li>▪ <b>Process:</b> Enter <b>BNP_BAPREFRESH_IMPORT</b> or click  to select it.</li> </ul>

3. Click .
4. Exit the **Manage Jobs** application.

## Create a Job Queue

To create a job queue:

1. Click **Admin » Job Management » Job Management Codes » Manage Job Queues**.
2. In **Job Queue ID**, enter **BNP**.
3. Click .
4. Exit the **Manage Job Queues** application.

## Create a Job Server

To create a job server:

1. Click **Admin » Job Management » Job Management Processing » Start/Stop Job Server**.
2. Enter or select values in the following fields:

Field	Field Value
<b>Sever Name</b>	Enter <b>BNPSERVER</b> .
<b>Destination Server</b>	Select <b>Default Server or Cluster</b> from the drop-down list.

3. Click .
4. Exit the **Start/Stop Job Server** application.

## Add Job to the Queue

In this step, you will assign the Job Queue you created in the above procedure ([Create a Job Queue](#)).

To submit a job to the queue:

1. Click **Admin » Job Management » Job Management Processing » Submit Job Queue**.
2. In the **Jobs Query** screen, query **All**.
3. On the **Submit Job to Queue** screen, enter or select values in the following fields:

Field	Field Value
<b>Job</b>	Enter <b>BNPREFRESH</b> in the popup <b>Query</b> .
<b>Queue</b>	Enter <b>BNP</b> or click  to select it.
<b>Execution Option</b>	Select <b>Start Time/Date</b> from the drop-down list.
<b>Start Date</b>	Click  and select tomorrow's date.
<b>Start Time</b>	Set time to <b>0200</b> .
<b>Recurrence Frequency</b>	Enter <b>1</b> .
<b>Recurring Time Frame</b>	Select <b>Days</b> from the drop-down list.

4. Click **Submit to Queue** to submit the job to the queue.
5. Exit the **Submit Job to Queue** application.

## Assign Queue to Job Server

To assign a job to the queue:

1. Click **Admin » Job Management » Job Management Processing » Start/Stop Job Server**.
2. In **Job Servers** table, select **BNP SERVER**.
3. In the **Assigned Job Queues** table, click **New**, then enter or select values in the following fields.

Field	Field Value
<b>Job Queue</b>	Enter <b>BNP</b> .
<b>Active for Server</b>	This field should be checked.

4. Click .
5. Click **Start**.
6. Exit the **Start/Stop Job Server** application.

## □ Step 4: Run a Manual Refresh

### To run a manual refresh:

1. Click **Planning » Administration » Administration Utilities » Report Table Update Process**.
2. On the Process menu, click **Action Menu » B&P Refresh Process** or simply click the Process icon  to run refresh in Attended Mode.

The refresh process allows you to run in Attended Mode. The advantage of this mode is that errors are flagged immediately. There is a progress bar, and a message indicates when the process is 100% complete. You would not be able to complete any other steps until this process is completed.

## □ Step 5: Add Users to Costpoint

In this step, you will add employees to Costpoint.

**Note:** If your installation of Costpoint Planning is new, but you are an established Costpoint customer and your employees already exist within Costpoint, you can skip to [Step 7: Enable User Security and Licensing Options](#).

To add users in Costpoint:

1. Click **Planning » Administration » System Security » Manage Users**.

This screen has the following tabs:

- **Information:** Enter user information, such as password, status, assign a preferred notification method, and assign permissions to change user information.
- **Workflow:** Specify workflow and email user preferences.
- **Printing Defaults:** Enter a user's default Web printing settings and locale (if they differ from the system defaults).
- **Authentication:** Define how Costpoint verifies user login.
- **User Interface:** Specify settings for screen configuration changes.

2. Click **New** to add a user.

**Note:** Detailed information about this screen is available from within the Costpoint online help. After you open the Manage Users screen, click **Help** on the Costpoint Help menu.

3. Click .

## □ Step 6: Assign Users to User Groups

Security for module, screen, and application access is managed through user groups. In this step, you will create user groups and assign users to them.

The Manage User Group feature enables you to create separate menus for a single user or group of users.

Although the licensing structure in version 8.1 enables you to automatically limit access to only the modules, screens, tabs, and reports by user type (for example, project manager, organizational manager, or administrator), this feature enables you to further limit the access to smaller subsets of users within the existing licensing structure.

Observe the following rules in creating User Groups:

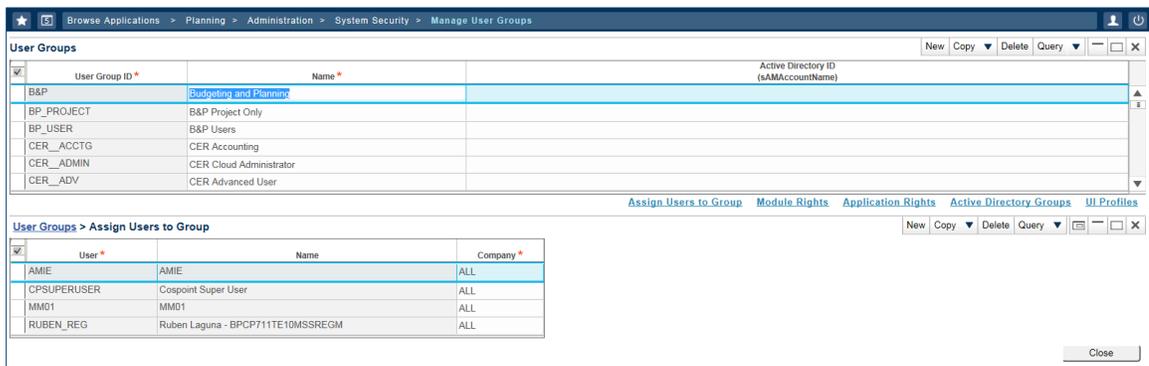
- Restrictions created in the User Group to certain areas of Costpoint Planning apply to members of the group even if the license types allow it.

**Note:** Assigning employees the role of Accountant or Administrator can grant access to menu items that fall outside the license type. However, if the employees are assigned to a User Group with restrictions to those items, they cannot view the said menu items.

- Certain areas in Costpoint Planning that are viewable to a user security group can only be viewed by the group's members if the license types also allow it.

To set up users in Costpoint:

- Click **Planning » Administration » System Security » Manage User Groups**.



The image above is taken from an environment where groups have already been created, and as such, the data is not representative of what will display for you. However, after you create your Users Groups, those groups will display in the upper table of the screen.

- Click **New** in the User Group table to create a User Group. Further establish security and access rights for that group using the following subtasks:
  - Assign User to Group:** Use this subtask to assign users to a user group.
  - Module Rights:** Use this subtask to assign **Read-Only**, **Full**, or **Deny** rights in one or more Costpoint modules to a user group by company.
  - Application Rights:** Use the fields in this subtask table window to assign **Read-Only**, **Full**, or **Deny** rights to a user in one or more Costpoint applications within a module.

## Step 6: Assign Users to User Groups

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- **Active Directory Groups:** Use this subtask to load Active Directory (AD) groups to Costpoint from a pre-generated CSV file.
- **UI Profiles:** Use this subtask to view a list of user interface (UI) profiles.

**Note:** For more detailed information about User Groups, see “User Access to Modules, Applications, and Reports” in the *Deltek Costpoint Security Guide*. Also see the Costpoint online help for the Manage User Groups screen.

3. Click .

## □ Step 7: Enable User Security and Licensing Options

In this step, you will review Costpoint Planning Licensing and Org Security options for each user.

To update user Org security and licensing information in Costpoint Planning:

1. Click **Planning » Administration » System Security » User Maintenance**.

User ID	User Name	Employee	Active	Administrator	License Type *	Security Org ID	Home Org ID
ACORIZA			<input type="checkbox"/>	<input type="checkbox"/>	None		
ADMIN			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Full		
AFCCT10012	Zorrick, Michael M	10012	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Full		
AFCPMGP014	Zales, Joseph I	10018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Full		
AMIE	Alexander, Damien D	GP100	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Full		
ARZEN			<input type="checkbox"/>	<input type="checkbox"/>	None	1.1.110	1.1.150

The image above is an example only. The field values are not representative of what will display in your system.

This screen is a Costpoint Planning specific user security screen, which controls the license Type and security organization of individual users. Once users are created in Manage Users, they will be visible in the User Maintenance.

2. For each existing user, review, and where necessary, edit values in the following fields:

Field	Field Value
<b>Active</b>	<p>Select this check box to indicate that the employee is active and should be counted against an active license. Clear the check box if the employee is no longer active and you want to free that license seat.</p> <p>Unless you are using the Cloud version of Costpoint Planning, if <b>Active</b> is selected, the number of currently active users is compared to the number allowed by your licensing, when you save the record.</p> <p>For non-Cloud customers, a warning message displays for the user when the license is within thirty days of its expiration date, or when the license has expired and the user attempts to logon.</p>
<b>Administrator</b>	<p>Select this check box to allow the user to take over and modify a New Business budget even if it is not shared.</p>
<b>License Type</b>	<p>Use this drop-down list to assign an available license type to a user. Choose from the following:</p> <ul style="list-style-type: none"> <li>▪ <b>None:</b> Select this option if the user does not have rights.</li> <li>▪ <b>Full:</b> This license provides access to all modules within the Planning Domain.</li> </ul> <p>Menu access is controlled by license type and can further be restricted by user security.</p>

Step 7: Enable User Security and Licensing Options

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Field	Field Value
<b>Security Org ID</b>	<p>Use this setting to assign users access to a specific Security Org ID within Costpoint Planning.</p> <p>By default, every user listed in the table is granted access to all levels of the Org structure. This is true even if the field is blank and does not display "All" as the value.</p> <p>To limit access to a specific Org ID within Costpoint Planning, select the user and click  to select the ID. The level you choose gives the user access to that level and all levels below it.</p> <p>Note also that Org security for Costpoint Planning is separate from and unrelated to Costpoint Org security.</p>
<b>Home Org ID</b>	<p>Click  to select the Home Org ID. This field reflects the organization to which the user's costs resolve.</p>

3. Click .

## □ Step 8: Validate Data

Prior to first use, it is strongly suggested that you validate your setup, configuration, and account mapping by running a few key reports in both Costpoint and Costpoint Planning and comparing the results.

We suggest you run the Costpoint and Costpoint Planning reports listed in the table below and confirm that the results are the same. You should confirm that Costpoint has not had any updates since the last the last refresh was run in Costpoint Planning.

Costpoint Reports	Costpoint Planning Reports	Notes
Financial Statement <b>Accounting » General Ledger » General Ledger Reports/Inquiries » Print Financial Statements</b>	Profit and Loss by Account <b>Planning » Organization Budgeting » Profit and Loss Reports » Profit and Loss by Account</b>	In Costpoint Planning, select <b>Cost</b> (actuals) under Report Type.
CP Statement of Indirect Expenses <b>Projects » Cost and Revenue Processing » Cost Pool Processing » Compute/Print Pool Rates</b>	Rate Analysis by Org report <b>Planning » Organization Budgeting » Rate Processing/Reports » Rate Analysis by Org</b>	In Costpoint Planning, select <b>Cost</b> (actuals) under Report Type, and <b>Pools</b> under Pool Type. Run the report for each pool and compare the results to the same pools in Costpoint.  To view the Statement of Indirect Expenses report in Costpoint without processing Cost Pools, do the following: <ol style="list-style-type: none"> <li>1. Complete parameters on the Compute/Print Pool Rates screen.</li> <li>2. Click  on the toolbar.</li> </ol>
Project Status <b>Projects » Project Inquiry and Reporting » Project Reports/Inquiries » Print Project Status Report</b>	Project Status report <b>Planning » Project Budgeting » Supplemental Reports » Project Status</b>	Use same parameters in both Costpoint and Costpoint Planning.

## Appendix A: Other Tasks

This concludes all of the post-installation configuration tasks that must be completed prior to first-use. However, there are other tasks related to establishing roles and managing users in Org and Project Budgeting, such as the following:

- **Maintain generic staff:** Establish generic job categories that are useful when you assign people that you do not already have on staff.
- **Maintain organizational budget approvers:** Establish who can create, edit and approve Org Budgets.
- **Maintain project budget approvers:** Establish the appropriate management authority structure that will underlie the budget creation and workflow process.

For more information on these additional tasks, see the [“Costpoint Planning 8.1: Manage Org and Project Budgeting Roles”](#) guide.

## Appendix B: If You Need Assistance

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

### 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.

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## About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. [www.deltek.com](http://www.deltek.com)