Costpoint Essentials & Costpoint Foundations

SaaS Customer Admininstrator Guide

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Contents

Overview

Welcome to your new solution. The Costpoint Essentials and Costpoint Foundations solutions are the leading project-based ERP solutions for government contractors. Both solutions are delivered via the Cloud to meet the ever-changing needs of small and mid-size organizations. Allowing you to leverage the benefits of the Cloud while always taking advantage of the latest Deltek software capabilities.

The SaaS Customer Administrator guide is a critical component of the SaaS customer administrator's role – both during the initial activation and ongoing management of the Costpoint Essentials and Foundations solution. Here you will also find information to help you manage your Costpoint Essentials or Foundations implementation.

- Available environments
- Processes and service requests
- Requirements for the development of customer-specific content
- General information regarding the offering itself.

This guide is updated frequently, and the latest version is always available from this Customer Care Connect link.

Deltek Solutions Offering

Deltek offers the following solutions:

- Costpoint Essentials
- Costpoint Essentials Plus
- Costpoint Foundations

Additional details on these offerings can be found at www.deltek.com.

This document is written for all three offerings. The guide will indicate when information pertains to only one of the solutions.

SaaS Customer Administrator

Each Costpoint Essentials and Costpoint Foundations customer must have a designated SaaS customer administrator. You must provide the name and email address of your company's SaaS customer administrator during, or prior to, signing your Subscription Agreement.

The SaaS customer administrator is responsible for managing your organization's Costpoint Essentials and Costpoint Foundations implementation and any ongoing service requests with Deltek. In addition, the SaaS customer administrator's responsibilities include the following:

- Uploading data
- Receiving and communicating system maintenance announcements
- Requesting backup restores
- Submitting portal graphics
- Requesting a development environment

For security purposes, Deltek will only process service requests that are submitted to Deltek Customer Care by your company's SaaS customer administrator. Requests submitted by personnel other than your SaaS customer administrator will be rejected.

Your organization can have a **maximum of three SaaS customer administrators** at any given time. Each SaaS customer administrator will have the same authority to administer the Costpoint Essentials and Costpoint Foundations solution and will receive the same communications from Deltek.

Deltek recommends that you assign a second SaaS customer administrator to ensure that your company is able to receive communication regarding your Costpoint Essentials and Costpoint Foundations solution at all times and that an administrator is always available to carry out service requests. Companies often assign 3rd party implementation consultants as SaaS customer administrators during the implementation period. Reminder, this will provide the 3rd party implementation consultant with full SaaS customer administrator authority over your Costpoint Essentials or Costpoint Foundations solution.

If your organization needs to change the SaaS customer administrator or add a SaaS customer administrator, please submit a service request to Deltek Customer Care as described in the *Submitting a Service Request* section of this document.

SaaS customer administrators are provided with a SaaS Customer Administrator Guide as part of the on-boarding process.

Additional Support Roles

As a Deltek customer various support roles must be filled besides the role of the SaaS Customer Adminitrator. These roles include the Primary Support Contact (PSC), Authorized Support Contact (ASC), and Support Contact Manager (SCM). A single individual may be assigned multiple roles or just one role. To further understand the various Deltek roles please review the KB# 39396 Customer Care Support Guide. To understand the steps of adding and updating support contacts please review KB# 36134.

How to Stay Informed

Deltek is committed to keeping you informed of any developments that may affect the availability or functionality of your Costpoint Essentials and Costpoint Foundations solution. There are several ways to stay informed:

- Your company's cloud portal
- Deltek Customer Care Knowledge Base
- Deltek Enterprise Learning Center

Cloud Portal

The Cloud Portal provides customers, consultants, and partners with the most up-to-date information regarding the Costpoint Essentials and Costpoint Foundations solution. Here you will find information regarding system maintenance schedules, upcoming releases, and links to documentation and training materials.

Please visit your company's cloud portal regularly for critical information regarding your organization's Costpoint Essentials and Costpoint Foundations solution. The link to your company's cloud portal is provided in your Welcome Email. Please distribute this link to all employees.

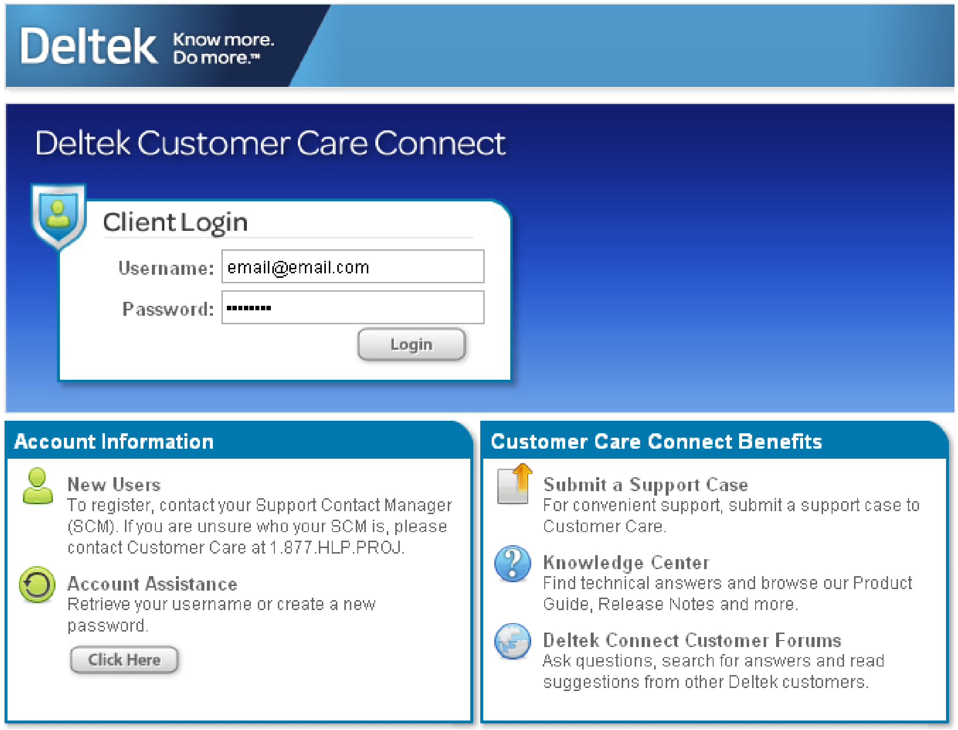
Deltek Customer Care Knowledge Base

The Customer Care Knowledge Base contains Costpoint Essentials and Costpoint Foundations-related articles as well as announcements regarding planned and unplanned maintenance.

Knowledge Base Article #76805 was specifically created for Costpoint Essentials and Costpoint Foundations. Deltek strongly urges you to subscribe to this Knowledge Base article. Whenever changes are made to Article #76805, a system-generated notification is automatically sent to anyone subscribed to it.

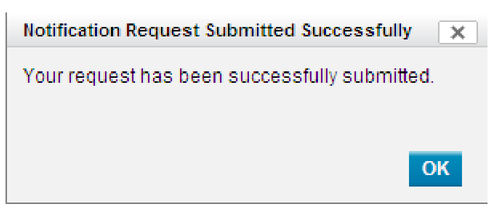
To subscribe to the Costpoint Essentials and Costpoint Foundations Knowledge Base article, complete the following steps:

1. Go to https://deltek.custhelp.com/app/answers/detail/a_id/76805
2. Log on to the Deltek Customer Care Connect site using the credentials provided to you when your initial Costpoint Essentials and Costpoint Foundations order process was completed.



3. Click **Notify Me** at the bottom of the article.

4. Click **OK** on the confirmation screen.



Deltek Enterprise Learning Center

The Learning Center contains training videos and presentations to help your employees get up to speed on Deltek tools as quickly as possible. The link to the Learning Center is provided below and can also be found on your company's cloud portal page:

https://education.deltek.com/LMSPresentations/Costpoint/Cloud/index.html

Training is available on the cloud portal anytime and anywhere, so your employees can launch the training whenever their schedule permits.

Training for GCS Premier/Deltek First customers migrating to Costpoint

Additional training is available for customer migrating from GCS Premier/Deltek First to Costpoint. This training includes virtual instructor led courses as well as online videos (sometimes referred to as confidence builders).

Click on the below link for instructions on how to register for a course, course descriptions and a schedule of upcoming virtual instructor led courses.

GCS to CP Migration Training >>

Click on the below link to gain access to the online video training. Please remember to enter deltekfirstcp\ preceding your username when logging in.

Deltek Learning Portal (log in as deltekfirstcp\username) >>

Environments and Databases

The table below details the types of environments and databases that are included in the Costpoint Essentials and Costpoint Foundations solution.

Environment	Description
Production Environment	This environment is where your company's live production databases are deployed and maintained. Only the Deltek Cloud Ops team has access to the Production Environment and the databases residing in this environment.
Sandbox Database	The Sandbox database resides in the production environment and only the Deltek Cloud Ops team has direct access to the Sandbox database. This Sandbox database is where you can test configuration changes before you implement these changes in your company's production database. The Sandbox runs the same version of the application as your company's Production Environment. All customers receive a Costpoint Sandbox database and a Time & Expense Sandbox database as part of their offering. The Costpoint Sandbox database is integrated with the Time & Expense Sandbox database. Customers cannot integrate the Sandbox database with their production database. For example, you cannot integrate your Costpoint Sandbox database with your Time & Expense Production database. Up to a maximum of two times per year, you can request that your company's Costpoint or Time & Expense Sandbox database be refreshed with your current Costpoint or Time & Expense Production database. To do so, submit a service request to process the database refresh.
Implementation Environment	An Implementation Environment is provided upon submission of a service request or upon the customer's indication during the sales process. Users have additional access to the databases and application tier in the Implementation Environment. This allows users to perform implementation services, develop and test stored procedures, develop Web services, and data migration processes. Users have access to SQL Server Management Studio in the Implementation Environment (Access to SQL Server

Environment	Description
	Management Studio is provided via Citrix). The SaaS customer administrator must submit a service request in order to request SQL Server Management Studio rights for a specific user. That user is provided the following database rights: ▪ Connect ▪ Select ▪ Insert ▪ Update ▪ Delete ▪ Execute (stored procedures and functions) ▪ Create table rights ▪ Create view rights ▪ Create stored procedure rights ▪ Users do not have access to the file server in the Implementation Environment. ▪ Users must submit a service request to promote their databases to the Production Environment. ▪ Up to a maximum of two times per year, customers can request that their Costpoint and/or Time & Expense Implementation database be refreshed with their current Production database. A service request must be submitted in order for Deltek to process the database refresh. ▪ The Implementation Environment runs the same version of the Costpoint and Time & Expense applications as the Production Environment. ▪ Deltek will decommission your Implementation Environment 30 days after you promote your Implementation databases to your Production Environment. Please contact support to request that your Implementation Environment availability be extended beyond 30 days if required.
Preview Environment	Users can preview the next major version of the Costpoint or Time & Expense application before Deltek updates the Production Environment databases to that version. Preview Environments are made available at Deltek's discretion. Customers can use the Preview Environment to train their employees on any new features and ensure that functions, such as stored procedures and Web services, are operating correctly in the next version of the application. Contact Deltek immediately if you encounter problems in the Preview Environment.

Standing Maintenance Windows

Every Tuesday and Thursday night from 2am – 4am EST (which is actually Wednesday and Friday mornings) Deltek maintains a standing maintenance window. The standing maintenance window will not always be used. Deltek will place a message in the System Maintenance area on your cloud portal if Deltek plans to conduct maintenance during the standard maintenance window.

Credential Management Tools

The following tools are available to Costpoint Essentials and Costpoint Foundations customers:

- **User Manager** – As the SaaS Customer Administrator you have administrative rights to User Manager. User Manager is used to manage your employee's user credentials. As a SaaS customer administrator, you can manually enter your company's employees into User Manager, or you can follow the Bulk-Load instructions and request Deltek to load users into User Manager.
    - Upon entering a user into User Manager, User Manager generates a username that will be used by the employee to authenticate into all of the cloud applications.

> After creating an employee's account in User Manager, you must also enter the user's username into the application (i.e. Costpoint and/or Time & Expense) that the user needs to access.

- **Self Service** – this tool is available to all users in your organization. Using this tool, users can activate their username, establish passwords, reset passwords, and unlock their account.

Please see the *Create Accounts For All Users* section of this document for further information on how to use User Manager and the Self Service tool.

You can access User Manager via the following link:
Manage User Accounts

You can access Self Service via the following link:
Forgot your Password?

Time & Expense Domain Names and Costpoint System Names

Time & Expense Domain Names

Before your cloud solution is deployed, you must provide the domain name that you wish to use for Time & Expense. The domain name is requested by Deltek during the sales process.

After you provide the domain name, Deltek uses the following pattern to establish the domain names of additional Time & Expense databases (schemas) for your company.

In this example, assume that the customer provided **Regent** as the domain name:

- **Regent** – Domain name for the Time & Expense Production schema
- **RegentConfig** – Domain name for the Time & Expense Implementation schema
- **RegentTest** – Domain name for the Time & Expense Implementation schema
- **RegentPrev** – Domain name for the Time & Expense Preview schema
- **RegentSbox** – Domain name for the Time & Expense Sandbox schema

Costpoint System Names

The Costpoint system name for the Costpoint Production database will be the same as the Time & Expense domain name that your company provided during the sales process. The following pattern is used to set up the system names of additional Costpoint databases for your company.

In this example, assume that the customer provided **Regent** as the Time & Expense domain name:

- **Regent** – System name for the Costpoint Production database
- **RegentConfig** – System name for the Costpoint Implementation database
- **RegentTest** – System name for the Costpoint Implementation database
- **RegentPrev** – System name for the Costpoint Preview database
- **RegentSbox** – System name for the Costpoint Sandbox database

Getting Started

This section provides detailed information for setting up your employees in the User Manager tool. As the SaaS customer administrator, you can create, modify, and disable user accounts using User Manager.

This section also contains information to assist your employee's with activating the user accounts using the Self Service tool.

After you have received your Welcome Email, you are ready to begin. Be sure to follow the steps outlined below to ensure that your solution is set up correctly.

Activate Your SaaS Customer Administrator Account

As the SaaS customer administrator, you will receive your **Username** and temporary **Password** via the Welcome Email and via a separate Password Email.

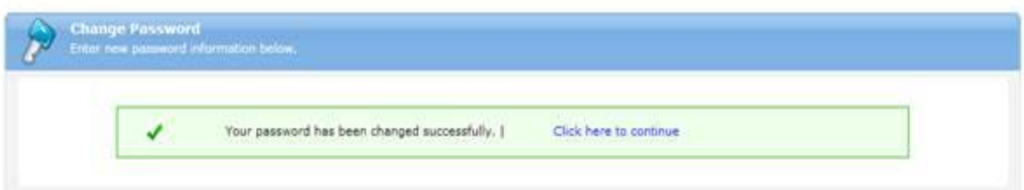
To activate your user account, complete the following steps:

1. Click the following link:

   [Forgot your Password?]

2. On the Sign in screen (left side of the screen), enter the initial username and password that was provided in your Welcome Email and Password Email.
3. Click **Login** and follow the steps on the screen to activate your account.

> When you get to the below screen in the activation process, you are NOT finished. You must click the **Click here to continue** link to complete the activation process.



Access Your Applications

After you have activated your account, you can use your username and password to authenticate into each application.

Costpoint

Use your username and password to authenticate into Costpoint. The **System Name**, which is required for login, is provided in your Welcome Email.

Your account is deployed with full rights to all licensed Costpoint modules.

If two SaaS customer administrator accounts were activated for your company, both SaaS customer administrators are granted full rights to all licensed Costpoint modules.

When creating new user accounts in Costpoint, always select **Active Directory** as the authentication model. This ensures that users are able to authenticate into all applications using their username and password created by User Manager.

Time & Expense

Use your username and password to authenticate into Time & Expense. The **Domain Name**, required for login, is provided in your Welcome Email.

Time & Expense is deployed with an **Install** record present in the database. The Install record is associated with the SaaS customer administrator's username. At some point during the implementation process the Install record should be deleted from the database.

If two SaaS customer administrators exist for your company, only one account is associated with the Install record. Unless specified during the sales process, the system will automatically select the SaaS customer administrator whose last name is listed first, according to alphabetical order.

Your company can have more than one user with full administrator rights to Time & Expense. As the SaaS customer administrator for Time & Expense, you can create a new user in Time & Expense and assign that user with full Admin rights to the Time & Expense application.

Costpoint Enterprise Reporting (CER)

Use your username and password to authenticate into CER. As the SaaS customer administrator, your account is deployed as the CER administrator. You can reassign the CER administrator privileges to another user at any time.

If two SaaS customer administrators exist for your company, only one account is assigned as the CER administrator. Unless specified during the sales process, the system automatically selects the SaaS customer administrator whose last name is listed first, according to alphabetical order.

The CER administrator also has rights to access the CER Framework models. Access to the CER Framework models is gained by first logging into Citrix. Please follow the instructions detailed in the *Install Citrix Plug-in* section of this document to complete the installation process. After you have installed the Citrix Plug-in, you can log in to Citrix using your username and password. Once you have authenticated into Citrix, you will be provided an icon to access the CER Framework models.

Costpoint Budgeting & Planning (B&P)

Use your username and password to authenticate into B&P. As the SaaS customer administrator, your account is deployed as the B&P administrator. You can reassign the B&P administrator privileges to another user at any time.

Your account is deployed with full rights to all licensed B&P modules.

If two SaaS customer administrator accounts were activated for your company, both SaaS customer administrators are granted full rights to all licensed B&P modules.

Costpoint Analytics (CPA)

Use your username and password to authenticate into CPA. As the SaaS customer administrator, your account is deployed as the CPA administrator. You can reassign the CPA administrator privileges to another user at any time.

If two SaaS customer administrators exist for your company, only one account is assigned as the CPA administrator. Unless specified during the sales process, the system automatically selects the SaaS customer administrator whose last name is listed first, according to alphabetical order.

User Manager

As the SaaS customer administrator, you can use your username and password to authenticate into User Manager. The SaaS customer administrator has administrator rights to User Manager.

Please see the *Create Accounts for All Users* section of this document for additional information on User Manager.

If two SaaS customer administrators exist for your company, both SaaS customer administrators are granted administrator rights to User Manager.

Install Citrix Plug-in

Citrix is required to access the following functions in the cloud.

- CER Framework Manager models by the CER administrator
- SQL Server Management Studio in the Implementation Environment

You must send Deltek a service request in order to grant a user access to SQL Server Management Studio in the Implementation Environment.

You may skip this step and return to it later if you do not need to perform any of these functions at this time.

To install the Citrix Receiver plug-in, complete the following steps:

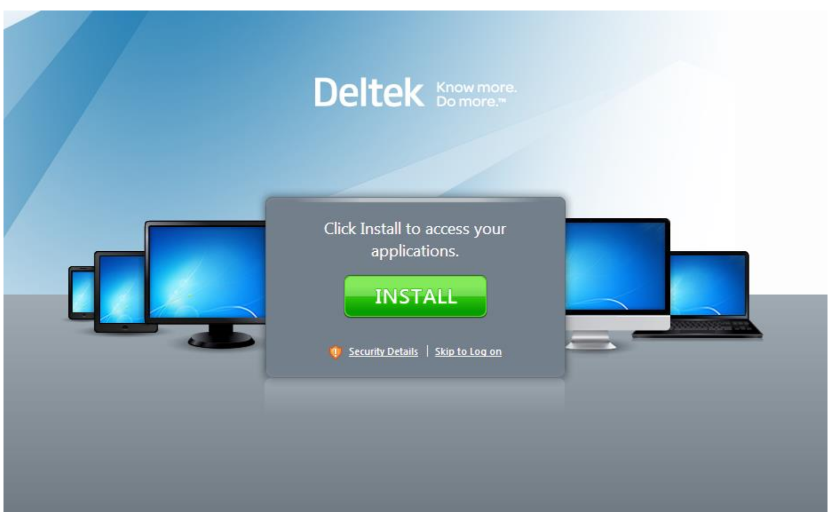
1. Go to http://www.citrix.com/downloads/citrix-receiver.html.
2. Click **Detect my device and install Receiver**.
3. Follow the instructions on the screen to install the Citrix Receiver.

Alternatively you can follow these instructions to install the Citrix Receiver.

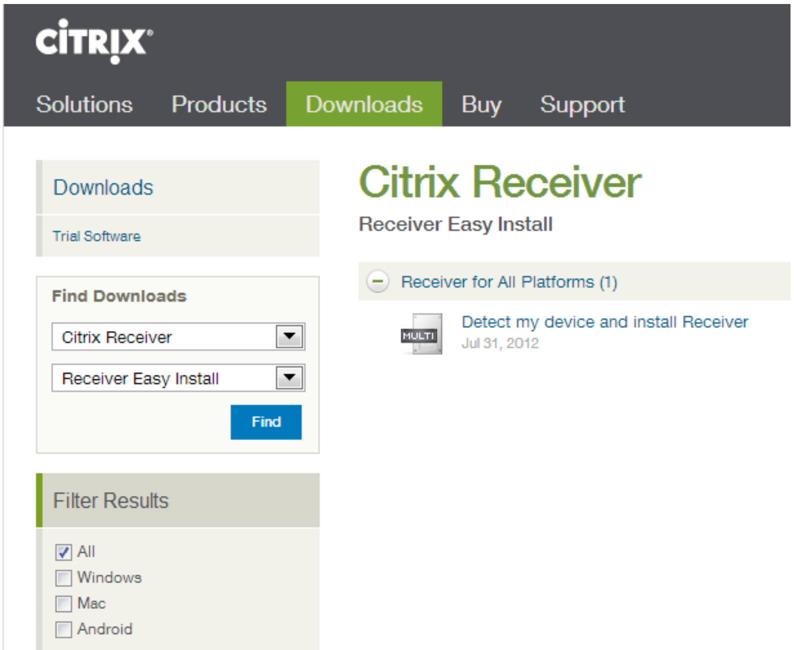
1. Click the following link from your cloud portal:

   Administrative Functions >>

2. On the installation page, click **INSTALL**.



3. Under **Find Downloads**, select **Citrix Receiver** and **Receiver Easy Install**, and click **Find**.



4. Click **Detect my device and install Receiver**.
5. Follow the instructions on the screen to install the Citrix Receiver.

Create Accounts for All Users

As the SaaS customer administrator, you have administrator rights to User Manager. Here, you can create, modify, and disable user accounts for all employees in your company.

Once users have activated their accounts, they can use their username and password to access all Costpoint Essentials and Costpoint Foundations applications in the cloud.

Before You Begin

Auto-Generated Emails — When you create an account in User Manager, an email is automatically generated and sent to the user. The user must follow the instructions in the email to activate their account.

The system also sends a copy of each user's activation email to the SaaS customer administrator. If any user is unable to locate the system-generated activation email, you can forward them the copy that you have received.

Configure SPAM filters

You must make sure that the auto-generated emails are allowed through your company's SPAM filters.

To configure your company's SPAM filters, complete the following steps.

1. White-list the following email addresses:

   nohelp-noreply@DeltekEnterpriseEssentials.com

   nohelp-noreply@CostpointFoundations.com

2. Configure your email provider's (online or on-premise) SPAM filter or other email filters to allow inbound email transmissions from the following IP address:

   Sendgrid: 167.89.11.197

   This IP address range is owned by Sendgrid, an industry leading and secure email and Web security service. The above IP address is safe and can be trusted by all Costpoint Essentials and Costpoint Foundations Cloud customers

Create New User Accounts

You can set up user accounts using one or both of the following methods:

- Create user accounts one at a time
- Request Deltek to bulk load users into User Manager. (Recommended for 25 or more users)

Create User Accounts One at a Time

To create single user accounts, complete the following steps:

1. Log on to User Manager with your username and password. Make sure that you have activated your account before performing this step:
2. Click the following link:

   Manage User Accounts

   This link is also accessible by clicking the **Manage User Accounts** link on your cloud portal.
3. You will be taken to the User Mgmt tab. Click **Create Single User**.
4. On the User Profile tab, complete the following fields for this user, **First Name**, **Last Name**, **Phone Number**, and **Email**. The other fields on this screen are automatically populated with default settings.

   Usernames are limited to 20 characters. The 20-character limit includes the 5-digit client ID and periods (.). The system will truncate usernames over 20 characters.

   All usernames will be generated using the following format:

   12345.Firstname.Lastname where 12345 is your Deltek customer number.

   First and last names cannot contain spaces or any special characters, including hyphens (-) or apostrophes (‘).

   Double check the email address to ensure that it is accurate. If the email address is incorrect, then enter the correct email address.
5. Specify a date when this user's account will expire by completing the following steps:
   - Click the Account Details tab.
   - In the **Account expires** field, select **End of**, and enter a date or select **Never**.
6. If the user requires access to CER, continue with the step 7. Otherwise, click **Create User**. An activation email will be sent to the user (a copy of the activation email will be sent to the SaaS customer administrator).
7. If this user requires access to CER, you must specify the type of license and database access for the user by completing the following steps:
   - Click the Account Details tab.

- In the **Group/Profile** section, find the **Member of** field, and click **Edit**.
- Select the appropriate CER License type. The license permissions are progressive, with the Admin containing all available permissions. The list in the table starts with the highest permission license type first, which is Admin. Thus, when adding Admin rights to a user, you do not also have to give the user Pro, Bus, and Con license types. Each user should only be assigned one license type.

  Deltek check to make sure the number of license types you assign to your users does not exceed the total that your company is licensed for.

CER License Type	Description
{Client}-CER-ADMIN	Use this to represent a CER Admin license
{Client}-CER-DEV	Use this to represent a CER Developer
{Client}-CER-ADV	Use this to represent an Advanced CER User
{Client}-CER-USER	Use this to represent a CER User

- Select the appropriate Database(s) access. By default, all users who have been assigned a CER license are provided with access to the Production database.

CER License Type	Description
{Client}-CER-DB-SAND	Provides user access to the corresponding Costpoint and Time & Expense Sandbox databases.
{Client}-CER-DB-PREV	Provides user access to Costpoint and Time & Expense Preview databases (when made available by Deltek).
{Client}-CER-DB-CONFIG	Provides user access to the corresponding Costpoint and Time & Expense databases in the Implementation Environment.
{Client}-CER-DB-TEST	Provides user access to the corresponding Costpoint and Time & Expense databases in the Implementation Environment.

- Click the **Add** button to add each as needed to the Selected Groups.
- Click **OK**, and then click **Create User**.

Bulk Load User Accounts

If you have more than 25 users, you may choose to have those users bulk loaded into User Manager.

To bulk-load users into User Manager, complete the following steps:

1. Complete the DeltekCostpointSaaSUserManagerBulkUploadTemplate.xlsx spreadsheet, which can be found in KB article #76807 via this link:

https://deltek.custhelp.com/app/answers/detail/a_id/76807

2. Submit the User Manager Bulk Upload Template service request and attach the completed spreadsheet. The users will be loaded into User Manager.
3. After the users are loaded into User Manager and their usernames have been created, you must add each username into the applications that the user requires access to. To do this, see the *Set up Users in Each Application* section of this document.

   If you submit the User Manager Bulk Upload Template service request Deltek can also load the usernames into the **LDAP ID** field in Time & Expense. The employee record must already exist in Time & Expense in order for Deltek cloud ops to complete this step. The employee records are typically populated into Time & Expense by processing the integration with Costpoint. Providing the Costpoint Employee ID in the bult upload template spreadsheet ensures that Deltek assigns the correct username to each employee in Time & Expense.

Follow Up – Account Activation

After the users are created in User Manager, each user must complete the steps that are detailed in the auto-generated Activation email in order to complete the user activation process. The email contains the username, the temporary password, and a link to the Self Service tool. As the SaaS customer administrator, you also receive a copy of each user's Activation email. If the user is unable to locate their email, you can forward a copy that you have received to the user.

Set Up Users in Each Application

Add users and their username to each application that they need to access. Users authenticate into each application using the same username and password.

To set up users in each application, complete the following steps:

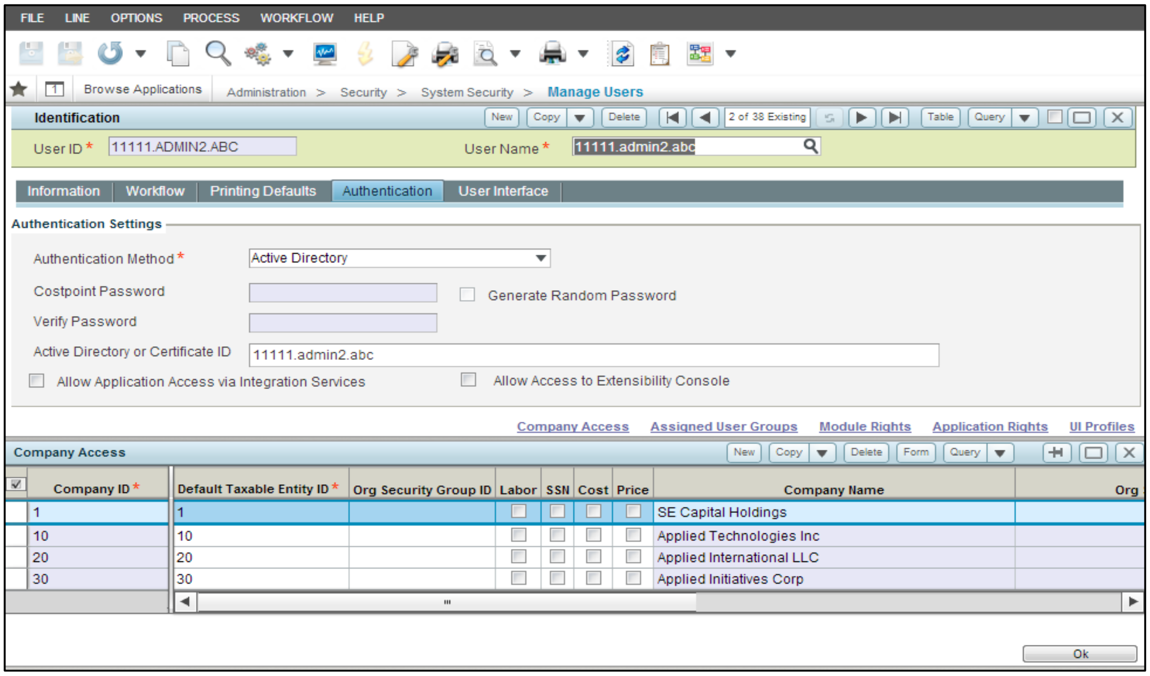
For Time & Expense:

1. Click **Personnel » Employee Information**, and Search for the **Employee ID**.
2. In the **LDAP ID** field, enter the employee's username, and click **Save.** Repeat for each employee.

> If you submitted a service request to bulk-load your users into User Manager, Deltek can also load the username into the LDAP ID field in Time & Expense. Time & Expense must already be populated with the employee records. The employee records are typically populated into Time & Expense by running the integration with Costpoint. Providing the Costpoint Employee ID in the bulk upload template spreadsheet ensures that Deltek assigns the correct username to each employee in Time & Expense.

For Costpoint:

1. Navigate to the Manage Users screen
2. Click the Authentication tab
3. In the **Authentication Method** field, select **Active Directory**
4. Populate the **Active Directory** or **Certificate ID** field with the user's username.



For Costpoint Budgeting and Planning:

1. Click **Administration » Reports & Actions » Actions »User Management » User Setup and Maintenance**.
2. Select **New**. Complete the required fields. In the Authentication field select either GlobalDefault or ActiveDirectory. .
3. Enter the user's username in the **Active Directory User ID** field.
4. Select **Update**.

For Costpoint Analytics:

The SaaS Customer Admin must complete and submit the DeltekCostpointAnalyticsUserSetupTemplate.xlsx spreadsheet, identifying which employees will have access to Costpoint Analytics.

1. Complete the DeltekCostpointAnalyticsUserSetupTemplate.xlsx spreadsheet, which can be found in KB article #82112 via this link:
2. Complete the Costpoint Analytics User Upload service request. The service request will instruct you to attach the completed spreadsheet. The users will be loaded into User Manager and will be able to authenticate into Costpoint Analytics.
3. The DeltekCostpointAnalyticsUserSetupTemplate.xlsx spreadsheet can also be used to remove a user's access to Costpoint Analytics. Follow steps 1 and 2 above to remove a user's access to Costpoint Analytics.

Ensure That Users Have the Appropriate Information

As the SaaS customer administrator, it is your responsibility to ensure that all users have the information they need to access and maintain their user accounts.

After you have set up the users in User Manager, and after you have added the usernames to the applications required by each user, please do the following:

- Send an email to the users with the link to your company's cloud portal. This link is provided in your Welcome email. The cloud portal contains links to all applications as well as a link to the Self Service tool users can use to reset their password or unlock their account.
- Provide users with further instructions regarding the applications that are available to them.
- Ensure that users activate their account. When you add users to User Manager, they are automatically sent an email instructing them to activate their account.

Users will continue to receive daily reminder emails until they activate their account.

Maintaining User Accounts

This section details information for maintaining user accounts using User Manager:

- For Users:
    - How to use the Self Service tool
    - How to change my challenge questions
- For SaaS customer administrator:
    - How to create, modify, and disable user accounts
    - How to unlock a user account
    - How to reset a user's password
    - How to run reports in User Manager
    - General User Manager questions

Self Service

The **Self Service** link on your cloud portal enables users to manage their acocunts themselves, without having to contact Deltek Customer Care. This tool enables users to reset their password or unlock their account.

Use the **Forgot your Password?** link on your cloud portal and follow the instructions to reset passwords or unlock accounts.

To use the Self Service tool, users must have successfully activated their account.

Change Your Challenge Questions

Users can change their challenge questions associated with their user account by re-activating their account. Click the **Forgot your Password?** link, sign in using the link on left side of the screen, and follow the instructions to change your challenge questions.

Manage User Accounts & Passwords in User Manager

When new employees are hired, you must use User Manager to create a new account for the employee.

When employees leave the company, you must disable the employee's account using User Manager.

You can also use User Manager to modify existing users accounts.

Create User Accounts

Please see the steps detailed in the *Create Accounts for All Users* section of this document.

Modify User Accounts

To modify user accounts, complete the following steps:

1. Log on to User Manager using the following link:

   Manage User Accounts

2. Click **Modify Single User**.
3. On the Modify Single User screen, scroll to select the user, and click **Modify User**.
4. On the Modify User Properties screen , click the General tab.
5. Modify the **Telephone Number**, and **E-mail** fields, as needed, and click **Update User**.
6. To modify a user's CER access click the Account tab.

   Follow Step 7 in the *Create New User Accounts* section of this document.

Disable Deltek Enterprise User Accounts

Disable accounts when an employee leaves the company, or when a consultant has completed a project. You cannot delete a user account. You can only disable accounts.

To disable accounts, complete the following steps:

1. Log on to User Manager using the following link:

   Manage User Accounts

2. Click **Modify Single User**.
3. On the Modify Single User screen, scroll to select the user, and click **Modify User**.
4. On the Modify User Properties screen, click the Accounts tab.
5. In the **Account Properties** section, select the **Disable Account** check box.
6. Click **Update User**.

Reinstate a Previously Disabled User Account

To reinstate a previously disabled account, complete the following steps:

1. Log in to User Manager using the following link:

   Manage User Accounts

2. Click **Modify Single User**.
3. On the Modify Single User screen, scroll to select the user, and click **Modify User**.
4. On the Modify User Properties screen, click the Accounts tab.
5. In the **Account Properties** section, clear the **Disable Account** check box.
6. Click **Update User**

Unlock a User Account

If a user has locked their user account while trying to activate their account, the SaaS customer administrator can unlock their account by following the steps below. After the account has been unlocked, the user can attempt to activate their account again.

To unlock a user account, complete the following steps:

1. Log on to User Manager, using the following:

   Manage User Accounts

2. Click **Unlock Users**.
3. On the Unlock Users screen, enter the name of the employee or just click the **Search** button to identify the employee whose account is locked.
4. Check the box next to the employee whose account is locked and click the **Apply** button.

Reset a User's Password

You can perform a password reset for users who have not activated their accounts and cannot locate the email that was sent to them by User Manager. This allows the user to complete the activation steps.

Users can reset their own passwords using the Self Service tool after they have completed the account activation steps.

To reset a user's password, complete the following steps:

1. Log on to User Manager, using the following link:

   Manage User Accounts

2. Click **Reset Password**.
3. On the Modify Password Attributes of the Users screen make sure that the **Reset Password** check box is selected.
4. Select the **Generate Password** radio button.
5. Under Password Options, make sure that the **User must change password at next logon** question is set to **Yes**.
6. Under **Show Users List**, enter the name of the employee or just click the **Search** button to identify the employee whose password needs to be reset.
7. Select the check box next to the employee whose account is locked and click **Apply**.

Run User Manager Reports

Run the User Manager Reports tool to generate a list of usernames to make it easier to input usernames into the applications, review password status, or review users by security group.

To run the User Manager Report, complete these steps:

1. Log on to User Manager using the following link:

   Manage User Accounts

2. Click the User Reports tab.
3. Select one of the following:
   - **User Reports** — Select **User Reports » All Users** or **Locked Out Users** to display a list of employee information.
   - **Group Reports** — Select **Group Reports » Security Group** to display a list of employees by security group.

- **More** — Select **More » Compliance Reports** to display a list of employees whose are locked out of their accounts.

4. Click **Generate**.

Password Requirements

Are the Challenge questions case sensitive?

No.

How long does the password stay active?

The password is active for 90 days. Two weeks prior to expiration, the user will receive an auto-email prompting them to reset their password.

What are the Password Requirements?

- Passwords may not contain the user's account name or two consecutive characters that spell parts of the user's full name.
- Passwords must be at least eight characters in length.
- The last 10 passwords cannot be re-used.
- Passwords must contain characters from three of the following four categories:
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphabetic characters (for example, !, $, #, %)

Can I reuse a password?

You cannot reuse your last 10 passwords.

Time & Expense (including Employee Self Service)

Import Files into Time & Expense

A separate link is provided on your cloud portal for importing data files into Time & Expense. All data imports are completed by clicking the **Import Timesheets & Expense Reports** link provided on your cloud portal.

Your **Login ID**, **Password**, and **Domain** for the **Import Timesheets & Expense Reports** link are the same as your standard Time & Expense login credentials.

You must log on using the **Import Timesheets & Expense Reports** link on your cloud portal to perform file imports. The import screens are disabled when logging in via the **Enter your Timesheet or Expense Report** link on your cloud portal. Performing functions other than file imports via the **Import Timesheets & Expense Reports** link is acceptable, but it should be reserved for file importing.

Time & Expense Email Functionality

To use the Time & Expense email functionality, complete the Setup TESS Email Functionality service request with the following information. Service Requests can be found here.

- **System Email Address** — This can be any email address (for example, time-expense@yourcompanyname.com).
- **Time Sender Email Address** — This can be any email address (for example, time@yourcompanyname.com).
- **Expense Sender Email Address** — This can be any email address (for example, expense@yourcompanyname.com).
- **ESS Sender Email Address** — This can be any email address (for example, ess@yourcompanyname.com).

Additionally, configure your email provider's (online or on-premise) SPAM filter or other email filters to allow inbound email transmissions from the following IP address:

Sendgrid: 167.89.11.197

The above IP address range is owned by Sendgrid, an industry leading and secure email and Web security service. The above IP address is safe and can be trusted by all Costpoint Essentials and Costpoint Foundations Cloud customers

Deltek Touch Time & Expense Setup

Instructions for setting up and using Deltek Touch Time & Expense can be found here.

Look for the **Click here for your Touch Server >>** link on your cloud portal page. This link will provide the Server URL. The Server URL is required to install the Deltek Touch Time & Expense application. Employees can access this link via your company's cloud portal.

Costpoint

Alternate File Locations

If your company is new to Costpoint Essentials and Costpoint Foundations—meaning your company is not currently using Costpoint in an on-premise environment or another vendor's hosting center—your Costpoint solution will be deployed with the following Alternate File Locations and User Groups. You must submit the Setup Alternate File Location service request to add additional Alternate File Locations. Service Requests can be found here.

Alternate File Location ID	Name	URL/Folder	Description
ALTERNATE	Alternate File Location	Defined by Deltek	The customer can use this Alt File Location at their discretion
CP-TESS-EXPORTS	Costpoint Exports to Import into Time & Expense	Defined by Deltek	Costpoint export files will be placed in this location for importing into Time & Expense
TESS-CP-IMPORTS	Time & Expense Exports to Import into Costpoint	Defined by Deltek	Time & Expense export files will be placed in this location for importing into Costpoint
CP-ANALYTICS-BUDGET	Budget Templates for CP Analytics	Defined by Deltek	Place the CP Analytics Budget templates in this location. These templates will be processed with the CP Analytics data load.
CP-ANALYTICS-ORG-SECURITY	Security Templates for CP Analytics	Defined by Deltek	Place the CP Analytics Security templates in this location. These templates will be processed with the CP Analytics data load.

Deltek creates the following corresponding User Groups that have access to each Alternate File Location ID. The customer is responsible for adding the users to each of the User Groups. Each user added to the User Group will have access to the corresponding Alternate File Location ID.

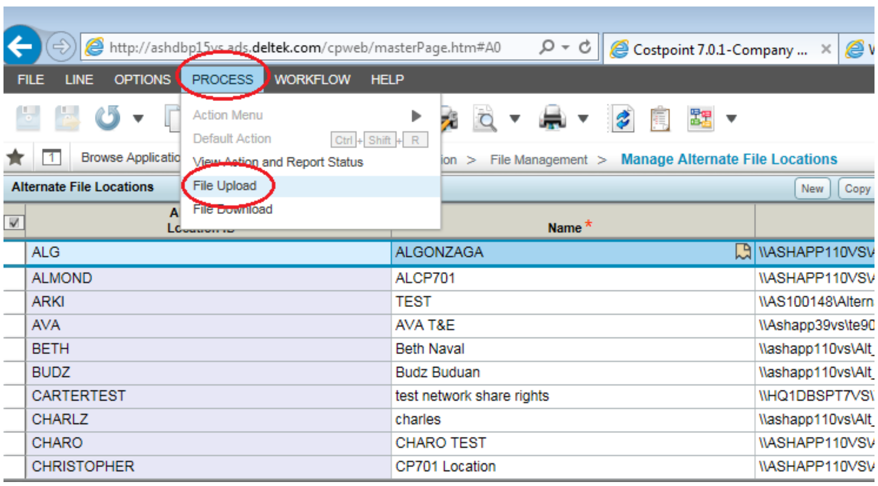
User Group	Description
ALTERNATE	Users assigned to this User Group will have access to the ALTERNATE Alternate File Location.
CP-TESS-EXPORTS	Users assigned to this User Group will have access to the CP-TESS-EXPORTS Alternate File Location.
TESS-CP-IMPORTS	Users assigned to this User Group will have access to the TESS-CP-IMPORTS Alternate File Location.
CP-ANALYTICS-	Users assigned to this User Group will have access to the

User Group	Description
BUDGET	CPANALYTICS-BUDGET Alternate File Location.
CP-ANALYTICS-ORG-SECURITY	Users assigned to this User Group will have access to the CP-ANALYTICS-ORG-SECURITY Alternate File Location.

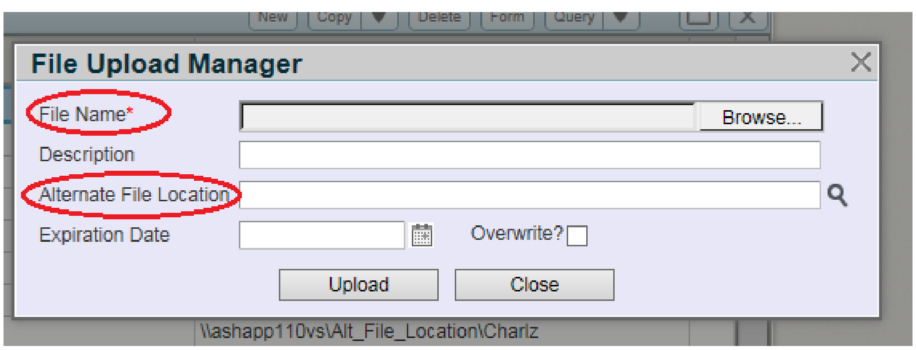
If your company is migrating an existing Costpoint database to the cloud, your migration consultant will work with you to request the creation of your Alternate File Location ID's, Name and URL/Folder's in the cloud.

Sample steps to load a file into an Alternate File Location:

1. Log into Costpoint.
2. Navigate to any function (Note: the "File Upload" option is grayed out if you are in the main menu).



3. Click on Process on the tool bar. Then click on File Upload to open up the "File Upload Manager" window.



4. Use the Browse button to the file you wish to upload.
5. Select the appropriate Alternate File Location and click Upload.

Set Your Browser to Work with Costpoint

Set Web Browser Internet Options

The steps to configure the Internet Explorer (IE) browser settings for Costpoint access are detailed in this section.

This step must be performed on all Windows client workstations that will access Costpoint.

To configure the browser settings for accessing Costpoint, complete the following steps:

1. Open your Web browser, and click **Tools** » **Internet options**.
2. On the Internet Options screen, click the General tab, and click **Settings** under the **Browsing history** section.
3. On the Temporary Internet Files and History Settings screen, complete the following:

Field Name	Action
Check for newer versions of stored pages	Select **Automatically**.
Disk space to use	Enter at least 100 Megabytes (MB).

4. Click **OK** to close the Settings screen.
5. On the Internet Options screen, click the Security tab, and click **Trusted sites** » **Sites**.

   Depending on your environment, you may need to add your Costpoint 7.0.1 URL under **Local Internet** instead of **Trusted sites**.
6. In the Add this website to the zone field, enter **http://<IPAddress** or ComputerName>, where <IPAddress or ComputerName> identifies your Costpoint 7.0.1 WebLogic application server or IIS Web server, depending on which server you will be using to access Costpoint 7.0.1 (for example, **http://10.2.2.154**).
7. Clear the **Require server verification (https:) for all sites in this zone** check box.
8. **Select** the check box, and click **Add**.
9. Click **Close**.
10. On the Internet Options screen, click the Advanced tab, scroll down to the **Browsing** section, and clear the **Reuse windows for launching shortcuts** check box.
11. Click **OK** to close the Internet Options screen.
12. Click **Tools » Pop-up Blocker » Turn Off Pop-up Blocker**.

    Disable any pop-up blockers or explicitly allow pop-ups for the Costpoint 7.0.1 URL, such as **http://<IPAddress or ComputerName>**, where **<IPAddress or ComputerName>** identifies your Costpoint 7.0.1 WebLogic application server or IIS Web server (for example, **http://10.2.2.154**).
13. Close your Web browser.

Costpoint Web Services Web Interface Console (WIC)

If you plan to use Costpoint Web Services please contact Deltek Customer Care and notify them that you would like Costpoint Web Services to be setup in your environment. Please allow for up to 5 business days before access will be provided to Costpoint Web Services.

The Costpoint WIC is available for customers planning to utilize the Costpoint Web Services.

Accessing the Costpoint WIC:

1. Click on Administrative Functions >> in the Customer Care quadrant on your cloud portal
2. Login to Citrix to access the tool using DELTEKFIRSTCP credentials
3. Select the Costpoint Integration Folder
4. Select the Costpoint Integration icon to run.
5. Select Login

Restarting Web Services

In addition to the Integration tool you will have the ability to restart the services and launch the monitoring tool for testing and diagnostics.

When restarting the Costpoint service please allow up to 5 minutes to access Costpoint or the utility.

Monitoring and Troubleshooting

Select Cosptoint Monitoring to identify the logs you want to collect. Select a local drive on your system to save the logs and diagnostics to.

When process completes review files or open a ticket with customer care and attach diagnostic with the case.

Deltek Talent Management

Integrating Deltek Talent Management with Costpoint is a simple process. Once you have received your token you should communicate this token to the Deltek Cloud Ops team. The Deltek Cloud Ops team will also need to know which site to connect to, i.e. Development, Production or Other.

Costpoint Analytics

The SaaS Customer Admin must complete the following steps in order to access Costpoint Analytics. This step only needs to be completed once.

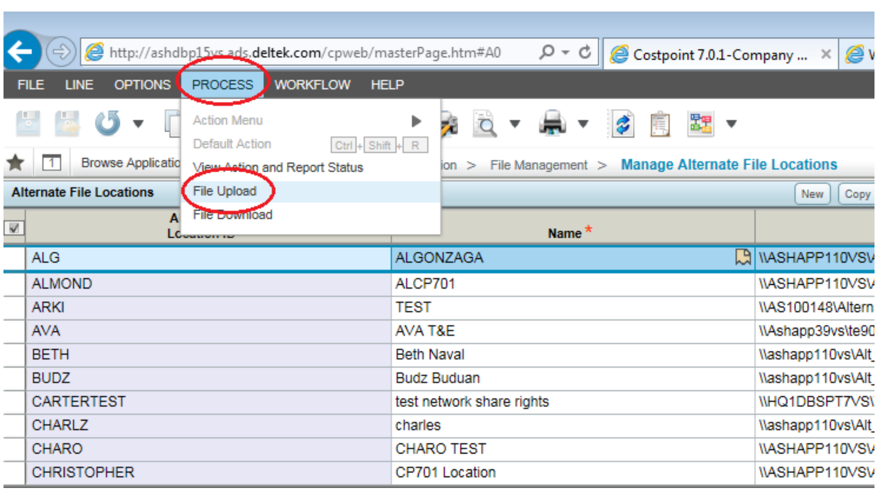
To initialize your CPA license complete the following steps:

1. Navigate to your cloud portal. Click on the Costpoint Analytics Admin >> link.
2. Enter your username and password. Your username must be preceeded by the following domain name. deltekfirstcp\
    a. Domain\user name: deltekfirstcp\12345.John.Smith
    b. Password: enter your password
3. On the RemoteApp and Desktops page click on the folder that reads Costpoint Analytics (your Deltek Client ID).
4. Click on the Initialize CPA License Enterprise icon.
5. Open and close any of the files displayed in the folder.
6. Your Costpoint Analytics license has been applied and you can begin using Costpoint Analytics.

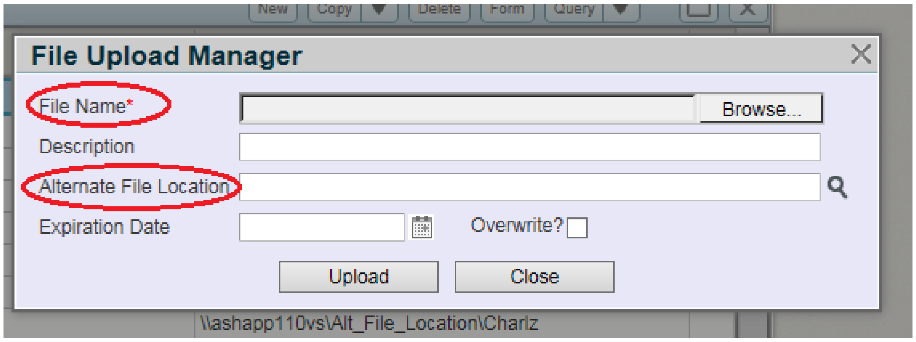
Loading Security and Budget templates:

Follow the steps below to load your Costpoint Analytics Security and Budget templates into the cloud. Deltek utilizes Costpoint's Alternate File Location feature to load the templates into the cloud. Once the templates are loaded into the Costpoint Alternate File Location they will be processed into Costpoint Analytics when the next data load is kicked off.

1. Log into Costpoint.
2. Navigate to any function (Note: the "File Upload" option is grayed out if you are in the main menu).



3. Click on Process on the tool bar. Then click on File Upload to open up the “File Upload Manager” window.



4. Use the Browse button to the file you wish to upload.
5. Select appropriate Costpoint Analytics Alternate File Location and click Upload.

Costpoint Analytics Data Loads:

Costpoint Analytics data loads can be processed the following two methods

- **On Demand** - The Costpoint Analytics Adminitrator has the ability to run the data load whenever they want. Keep in mind running the data load can impact the performance of your Costpoint Analytics solution. It is highly recommended that the data load process is run during non-peak business hours. Selecting to only load incrementatal changes to the data can decrease the performance load. It is highly recommended you select this option when running an on demand data load.
- **Scheduled Nightly Data Load** – The Costpoint Analytics data load process will run nightly at 2 a.m. EST. The SaaS Customer Admin should submit a support ticket to initiate the scheduled nightly data load process.

Frequently Asked Questions

How do I change or add a SaaS Customer Administrator?

If you are currently a SaaS customer administrator and want to add or remove someone as a SaaS customer administrator, you can do this by submitting the SaaS Administrator Change service request. Service Requests can be found here.

If you are adding a new SaaS Customer Administrator, prior to submitting the SaaS Administrator Change service request to add the SaaS Customer Administrator, you must create the user in User Manager. This will allow the Deltek Cloud Ops team to promote the user to have SaaS Customer Administrator rights.

If all SaaS Administrators have left your organization, an officer from your organization will need to submit, on company letterhead, authorization to change the SaaS customer administrator which can be submitted electronically or via fax.

The authorized letter must contain the following information:

- The name of the previous SaaS customer administrator
- The previous SaaS customer administrator's email address
- The name of the new SaaS customer administrator
- The email address of the new SaaS customer administrator
- Mailing address for the new SaaS customer administrator
- The Name and Office Address of the Company officer initiating the request

To make the request electronically, complete the following steps:

1. Go to Submit Case.
2. Select Connect/RNT Issues - Connect as the Product.
3. Select the Severity Level.
4. Select Application as the Issue Type.
5. Enter in SaaS Administrator Change as the Summary.
6. Enter the Detail for your request.
7. Attach the authorization letter.
8. Click **Continue** to submit the request.

To make the request by fax, complete the following steps:

1. Complete the request on company letterhead.
2. Send the authorization letter by fax to (339) 469-8970.

Where do I find system maintenance schedules?

Deltek makes every effort to minimize the scheduled maintenance windows of your Costpoint Essentials and Costpoint Foundations solution. Scheduled maintenance windows are communicated to you several ways to ensure you are always informed and able to plan accordingly.

A maintenance window is displayed on your cloud portal providing you with an up to date schedule of all planned maintenance windows. Deltek also maintains a Knowledge Base article #76805 with all the scheduled maintenance windows. Click here to access KB#76805, https://deltek.custhelp.com/app/answers/detail/a_id/76805.

How do I report an unplanned outage?

The SaaS customer administrator should report all unplanned outages to Deltek. In most cases, Deltek is already aware of the outage and working to resolve it.

The SaaS customer administrator must verify the following before reporting the outage to Deltek.

- The Internet connection is still working. A workstation or laptop can bring up www.deltek.com.
- The user is entering the correct password.

After the SaaS customer administrator verifies the two items above, they should notify Deltek by completing the Report an Outage form found here.

How do I report an unplanned outage after hours?

To report an unplanned outage, complete the following steps:

1. Call the Deltek On-Call Support Number 1-888-668-7651.
2. Select Option **1**.
3. Provide your Client ID.
4. Explain the issue is an unplanned outage with Deltek Enterprise Cloud.

Should I bookmark application links?

Users should not bookmark the application links; instead users should always first navigate to their cloud portal and click the application links. This will ensure the user is accessing the applications via the correct link.

Submitting a Service Request

The SaaS customer administrator is responsible for submitting all service requests to Deltek. Only the SaaS customer administrator will see the service requests window when they are logged into the customer care connect cloud page.

Example Service Requests include the following:

- SaaS Administrator Change
- Setup TESS Email Functionality
- Cloud Portal Logo Upload
- Database Refresh
- Promote to Production
- Development Environment Creation
- Enable/Disable B&P Imports
- Development Environment User Access/Removal
- Setup Alternate File Location
- Production Database Backup Download
- Enable Costpoint to GovWin CRM Integration
- User Manager Bulk Upload Template

For security purposes, Deltek only processes service requests that are submitted to Deltek Customer Care by your company's SaaS customer administrator. Requests submitted by personnel other than your SaaS customer administrator are rejected.

Your organization can have a maximum of three SaaS customer administrators at any given time. When more than one SaaS customer administrator is identified, each administrator is conferred the same authority to administer the Costpoint Essentials and Costpoint Foundations solution and receives the same communications from Deltek.

Deltek recommends that you assign a second SaaS customer administrator to ensure that your company is able to carry out service requests at all times.

If your organization needs to change the SaaS customer administrator or add a SaaS customer administrator, please submit the appropriate service request. Prior to submitting the service request to add a new SaaS Customer Administrator you must set up the user in User Manager.

To submit a service request, you must log on to the Deltek Customer Care Connect site. Service requests can be found here. On the right hand side of the screen, you should see available service requests. Only the SaaS customer administrator will be able to see the available service requests. Follow the online instructions to submit the request.

Costpoint Essentials and Costpoint Foundations Implementation for New Customers

If your company is new to Costpoint Essentials and Costpoint Foundations—meaning your company is not currently using Costpoint or Time & Expense in an on-premise environment or another vendor's hosting center—you have several options as to how you can proceed with your implementation.

Deltek suggests that you discuss the options with your internal staff and your implementation consultant to determine the approach that will work best for your company.

After you have received your Welcome Email indicating that your Costpoint Essentials and Costpoint Foundations solution has been deployed, you are ready begin your implementation.

Option 1: Implement Costpoint and Time & Expense Directly on Your Production Environment

For this option, Deltek will deploy a blank Costpoint and Time & Expense database to your production environment for you to begin your implementation. You will work directly in the production databases to complete your implementation. Direct database access in the production environment is not available. If direct database access (MS SQL Server Management Studio) will be required, please consider another implementation option.

If your company has purchased the Deltek Quick Start Implementation package and your company has decided to start with the Costpoint Quick Start database, Deltek deploys the Costpoint Quick Start database in the production environment.

Option 2: Implement Costpoint and/or Time & Expense in Your Implementation Environment

For this option, Costpoint and Time & Expense are activated in your Implementation Environment. This method provides you with additional privileges and tools to conduct your implementation. In the Implementaton Environment, you have direct access to the database and the ability to use MS SQL Server Management Studio. Please see the *Environments and Databases* section of this document for further information regarding the Implementation environment. You may also decide to implement Costpoint in the Implementation environment and Time & Expense in the Production environment, or vice versa.

If you did not request an Implementation Environment during your sales process, you must submit a service request to set up the Implementation Environment and corresponding databases.

After the Implementation Environment is set up, you can access Costpoint and Time & Expense via the links on your cloud portal. Refer to the *Time & Expense Domain Names and Costpoint System Names* section of this document to understand the system and domain names that you can use to log in to the databases. You can then proceed with your implementation.

Establishing user accounts in User Manager for consultants or partners working on the implementation is the responsibility of the SaaS customer administrator.

Be sure to read and understand the following guidelines when working in the Implementation Environment:

- You can request access to the SQL Server Management Studio in the Implementation Environment (SQL Server Management Studio access is provided via Citrix). To do so, you must submit a service request to grant SQL Server Management Studio access rights to a specific user. The user will have the following rights:

  - Connect
  - Select
  - Insert
  - Update
  - Delete
  - Execute (stored procedures and functions)
  - Create table rights
  - Create view rights
  - Create stored procedure rights

- The Implementation Environment runs the same version of the Costpoint and Time & Expense applications as the Production Environment.

As you approach completion of your implementation, you need to submit a service request to move your databases to the Production Environment. The Deltek Cloud Operations team will work with you to schedule and complete this step. Please provide ample lead time for Deltek Cloud Operations to complete this step.

Migrating Existing Costpoint and Time & Expense to the Cloud

If you are an existing Costpoint and/or Time & Expense customer, you need to work with a Deltek migration consultant to coordinate your migration to the cloud. The migration consultant ensures that your transition to the cloud is a smooth one.

The following are high-level guidelines that your migration consultant will discuss with you.

- Ensure that your on-premise applications are running the same version as the cloud
- Do not patch your on premise solution beyond the version that is active in the cloud
- Identify any third-party integrations and clarify how they will be supported in the cloud
- Ensure that your team is trained on how to use the new functionality in the cloud
- Set up your users in User Manager
- Provide Deltek Cloud Operations with the information they need to deploy your cloud solution
- Upload databases to the cloud
- Upload CER reports to the cloud
- Coordinate a "test migration run" to the cloud
- Schedule the "go live" date

Required Information

The following information is required to complete the migration:

- For Costpoint:
    - Costpoint CPSUPERUSER password
    - Files stored in your Costpoint Alternate File Locations —Provide Deltek Cloud Operations with these files as well as their particular corresponding Alternate File Location IDs.
    - Costpoint Database Backups —Be sure to make a "native" SQL Server backup to send to Deltek Cloud Operations.Zip the backup before sending the file.
- For Time & Expense:
    - Domain name — This was captured during the sales process.
    - Customized graphic files — Deltek needs the Time & Expense graphic files that you have customized (for example: company logo, branding area graphic, and splash screen graphic).
    - Expense report receipts — These are the PDF files attached to your users' expense reports. Zip the PDF files before sending them.
    - **From** email address for Time & Expense messages — See the *Time & Expense Email Functionality* section of this document.
    - Time & Expense database backup — Be sure to make a "native" SQL Server backup to send to Deltek Cloud Ops. Zip the backup before sending it.

Uploading Databases and Files to the Cloud

Databases and any other files can be uploaded to the EFT (SFTP) server as follows:

Field	Details
Host Name	sftp1.deltekenterprise.com
Host IP Address	54.208.154.241
Username	Deltek Cloud Ops will provide the username
Password	To be provided in a separate email with no “Subject” line
Protocol Type	SFTP using SSH2 (Secure Shell)
Port	22

After you have completed the authentication process, your Home root folder contains two folders: **\Download** and **\Upload**. Post your files and databases to the **\Upload** folder.

Inform Deltek, via a support ticket, that your file transfers are complete. When you notify Deltek, Deltek Cloud Operations will move the files from the EFT (SFTP) server to their respective destinations within the Deltek Enterprise Cloud.

Deltek then provides you with a password for the EFT username.

Migrating Your CER Content to the Cloud

The following instructions will help you migrate CER to the cloud. You also have the option to start fresh in the cloud and not migrate any of your reports. If you choose to start fresh, then you will be provided with the latest CER configuration interface provided by Deltek. Your migration consultant will help you complete these steps.

Submitting Report Packages

You must submit the Framework models that were used to create your CER report packages. This will ensure the Deltek Cloud Ops team can update and republish your CER report packages without the DELTEK schema name. The CER report packages in the Deltek Cloud environment do not contain a schema name.

Shortcuts and Report Views

If you are currently using Shortcuts in your on-premise deployment of CER, read this section carefully before proceeding.

Shortcuts will not migrate to the cloud. They will break when your CER report package is migrated to the cloud. Customers should follow one of the suggested options when migrating their CER report packages to the cloud.

Option 1

Rebuild all shortcuts as report views in your on-premise environment prior to migrating CER to the cloud. Report views survive the migration, ensuring your report portals work after CER is migrated to the cloud.

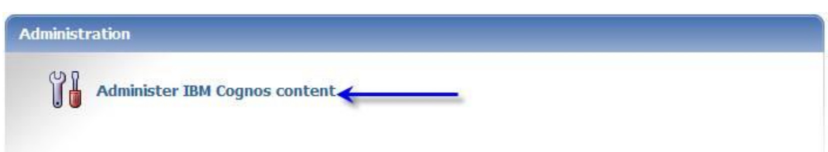
Option 2

First, audit your on-premise CER environment;. Identify and document all existing shortcuts. Next, move forward with your CER migration. After CER is migrated to the cloud, you should rebuild your shortcuts as report views.

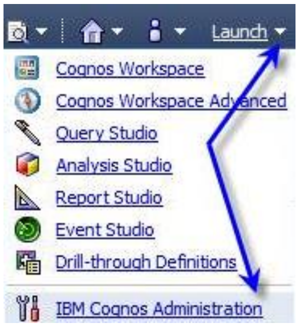
Exporting Cognos Content

To export your Cognos content, complete the following steps:

1. Log on to your existing CER portal with an administrator account.
2. Access the **Administration** area using any of the following methods:
   - At the Welcome screen, click **Administer IBM Cognos content**.



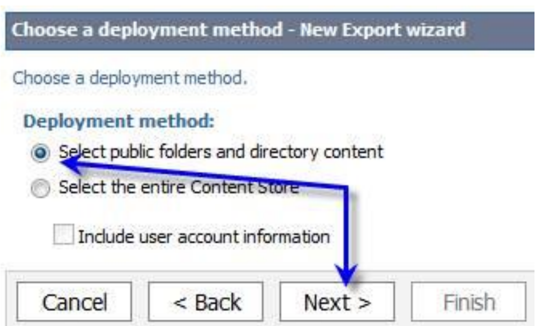
- If you prefer to go straight to the Cognos Connection area, click the **Launch** drop-down, and select **IBM Cognos Administration**.



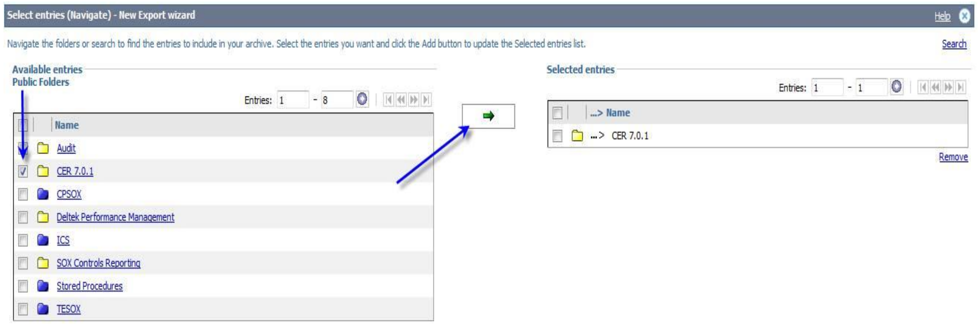
3. Click the Configuration tab, and click **Content Administration**.

4. Click the **New Export** icon in the toolbar

5. Name it "*<your company name>* Transfer to Deltek," and click **Next**.
6. For **Deployment method**, select **Select public folders and directory content**, and click **Next**.



7. In the **Public Folders** section, click **Add**.
8. Select the check boxes next to the folders that you want to migrate, click  to move the folders to the **Selected entries** section, and click **OK**.

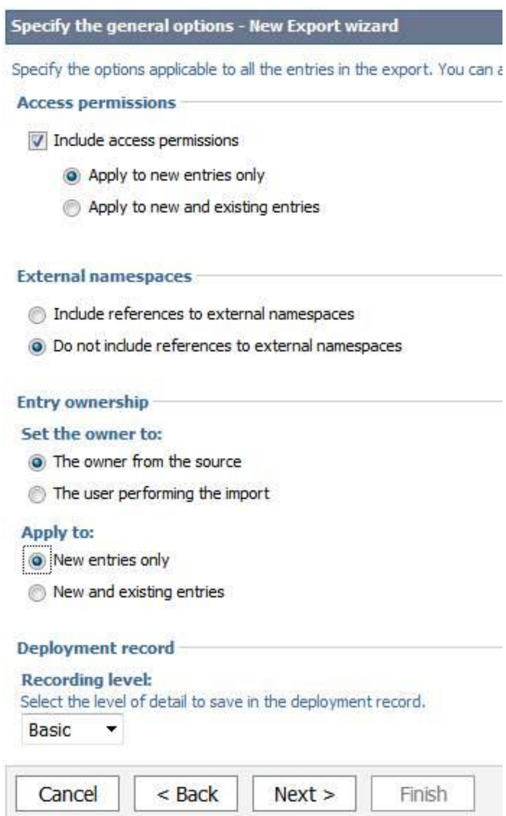


9. Select the **Report Output** versions that you want to transfer for the **Include run history** and **Include schedules** options, and click **Next**..

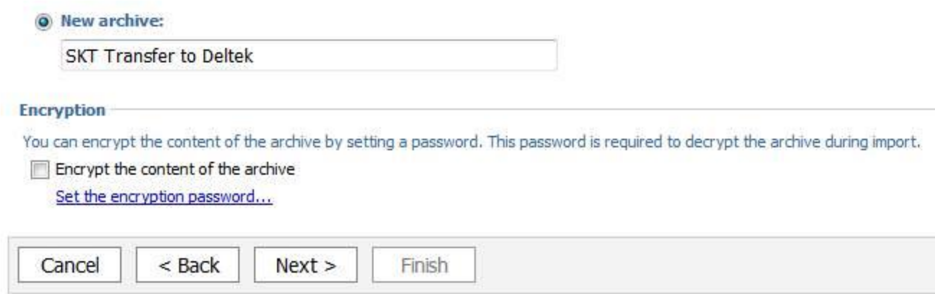
Deltek recommends that you include only the schedules. Including output versions could result in extremely large files to transfer.

10. Select the **Directory content** options as follows, and click **Next**. Please DO NOT include data source connections as they will not work in the cloud and will be re-established as part of the Cognos implementation.

11. Select the **General Options** as follows, and click **Next**.

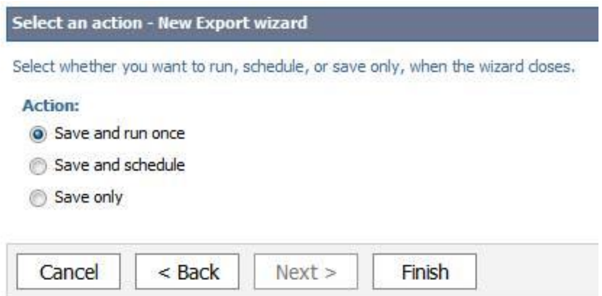


12. Leave **New Archive** selected with the name specified, and encrypt the content of the archive, and click **Next**



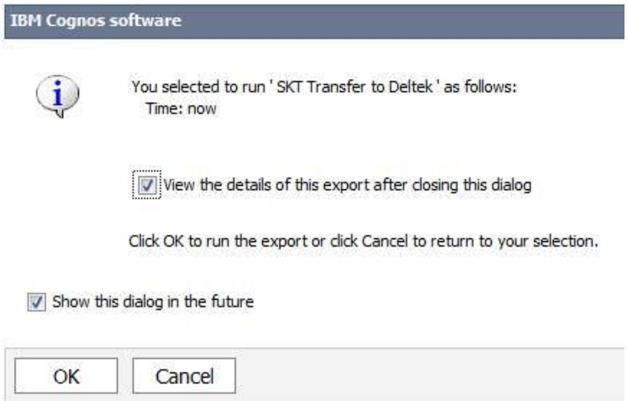
You can also choose to not encrypt since you are transferring this over SFTP, so it will be secure during the transfer. If you choose to encrypt, you will need to provide Deltek with the password you used.

14. Verify that your selections are correct, and click **Next**.
15. Select **Save and run once**, and click **Finish**.

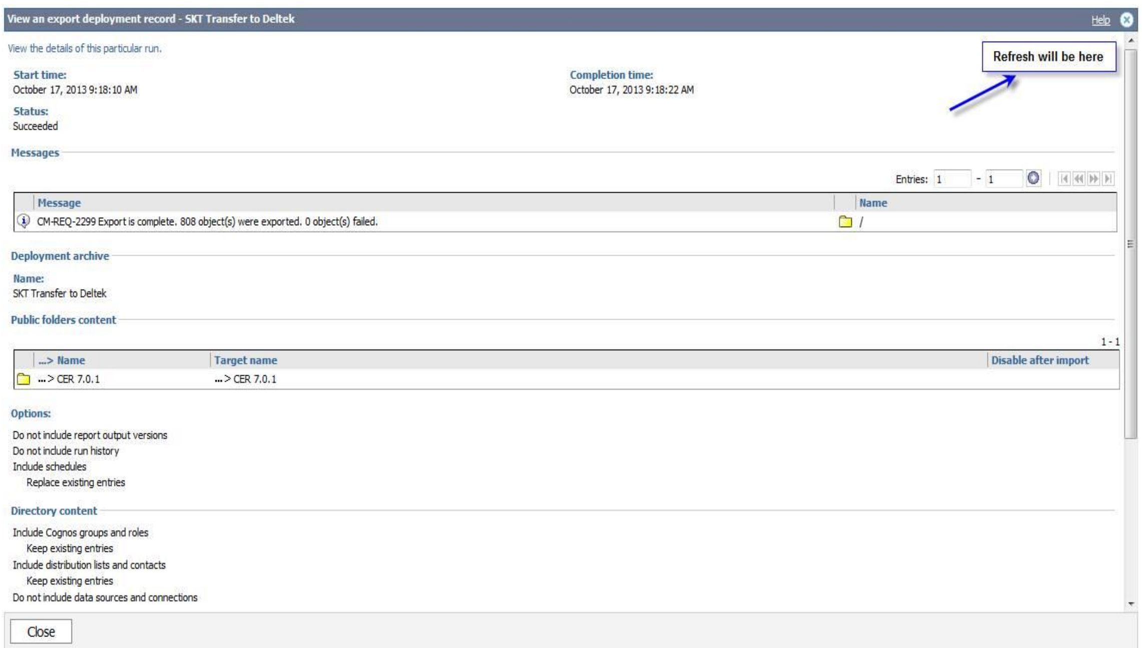


16. Select **Now**, and click **Run**.

17. Select the **View the details** option, and click **OK** to confirm that the report was successfully exported. If you choose not to view the details, wait 15 or 20 minutes before moving on to the **Gather Files to Migrate** section.



18. If you chose to view the details, there is a **Refresh** link that you can click from time to time to check the status. Click **Refresh** until you see a results screen similar to the screenshot below. DO NOT use the browser refresh button or the portal refresh button located beside the **Log Off** link in the toolbar. When complete, click **Close.**



Gathering Files to Migrate

To gather files to migrate, complete the following steps:

1. Log on to your Cognos server and browse to the path **{cognos install location}\deployment**. Here you will find a zip file that matches the name of the export you just ran. This is the first item that you need to send to Deltek.

2. In addition to the deployment file, you need to zip and send Deltek all of your framework models. Only send the current models unless you really need access to archived versions. The files are typically stored in a Deltek folder on your Cognos server, either in the install directory or in the root of your C or D drive.

However, if you are unsure of the location, open Framework Manager and look at the recently used files list.Bear in mind that, although the files were recently used, it does not necessarily mean that the files are actually in your current production models.

Send the entire folder where the files are found, not just the model files, as there are other supporting files in those directories that are needed.

Sending the wrong models results in loss of customizations. Odds are, before your content will work in the cloud, all your packages will need to be republished with references to the "Deltek" schema removed. If the models you send are not current, this republish will override your customizations.

Transferring Cognos Content

After you have gathered both your deployment file and your Cognos framework models, follow the directions below to send these via SFTP:

To upload Cognos content to the Deltek Enterprise Cloud, complete the following steps:

1. Connect to the Deltek Enterprise EFT (SFTP) server using the following settings:

Field	Details
Host Name	sftp1.deltekenterprise.com
Host IP Address	54.208.154.241
Username	Deltek Cloud Ops will provide the username
Password	Deltek Cloud Ops will provided the password in a separate email that contains no Subject line
Protocol Type	SFTP using SSH2 (Secure Shell)
Port	22

2. After you have completed the authentication process, there will be two folders in your Home root folder: **\Download** and **\Upload**. Post your files and databases in the **\Upload** folder.
3. Inform Deltek Cloud Operations after your file transfers are complete. When you notify Deltek Cloud Operations, they will move the files from the EFT (SFTP) server to their respective destinations within the Deltek Enterprise Cloud.

Deltek is the leading global provider of enterprise software and information solutions for professional services firms, government contractors, and government agencies. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,000 organizations and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resource, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.®

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