Deltek

Deltek Costpoint Cloud

Scheduled Database Export Setup Guide

October 15, 2018

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This edition published October 2018.

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Overview

The Scheduled Database Export service is an add-on service for Costpoint Cloud customers. You must be subscribed to this service to enable it. Please follow the steps outlined in this document to complete the setup within your Costpoint Cloud offering.

Prerequisites

- You must have purchased the add-on for Scheduled Database Exports. If you are unsure if you have purchased it or would like to arrange a purchase please contact your CSM.
- The price of Scheduled Database Export service is based on the size of your combined databases (Costpoint, Time & Expense and Budgeting & Planning). Your Customer Success Manager can help you determine the size of your combined databases.
- The Scheduled Database Export service is only available for databases in your Production Environment.
- Your organization must have an Amazon Web Services S3 drive. Deltek will connect to this drive to deliver the database exports.

Step One: Allow Deltek's IAM Role Access to Your S3 Storage

In order to complete this step, you will need to know the name of the Deltek Identity and Access Management (IAM) Role. The name of the Deltek IAM Role can be found in the Welcome Email you received when you purchased this add-on.

To allow IAM role access to your S3 storage:

1. Go to Amazon S3, and locate or search for the S3 bucket that needs modification.

   You may want to create a new bucket for the Database Exports.

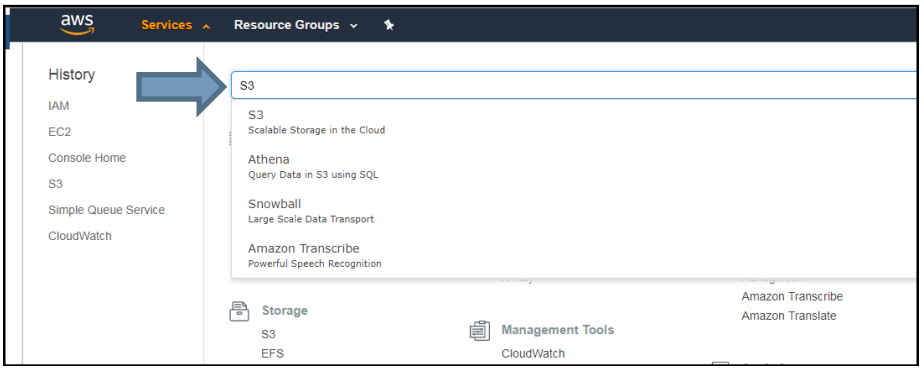


Figure 1: Amazon S3

2. Click the hyperlink on the bucket name.

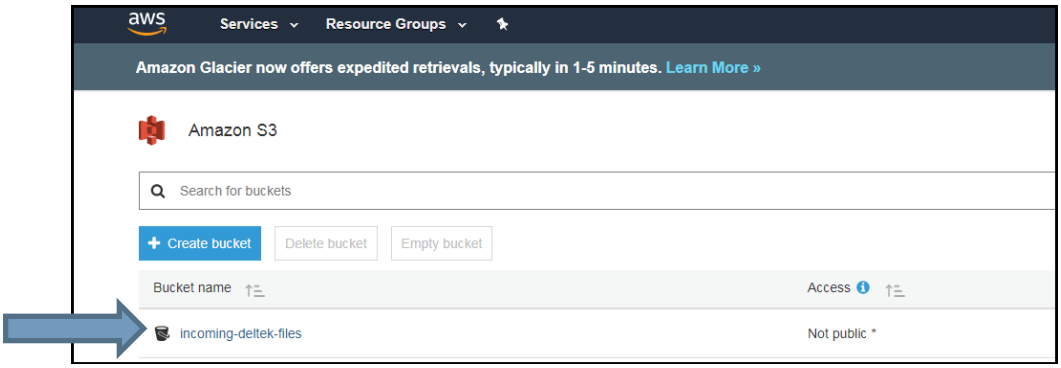


Figure 2: Bucket List

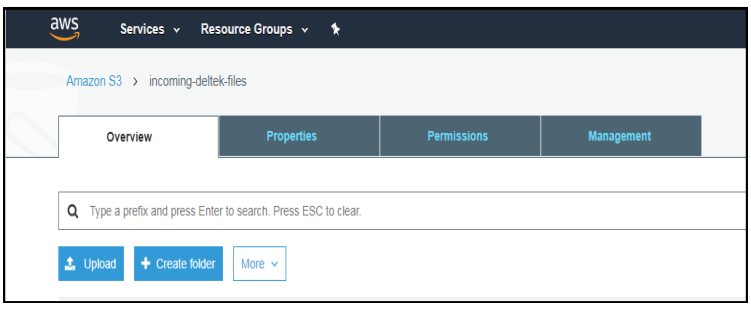


Figure 3: Bucket Details

3. Click the Permission tab, and click **Bucket Policy**.

Figure 4: Bucket Permissions

4. In the Bucket policy editor, take one of the following actions:
   - If the Bucket policy editor is empty, copy and paste the policy provided below (Figure 5).

     Please note, the highlighted sections will vary based on your product and based on the S3 bucket name you use.

```
{
    "Version": "2012-10-17",
    "Id": "1",
    "Statement": [
        {
            "Sid": "Allow Deltek IAM Role to this S3",
            "Effect": "Allow",
            "Principal": {
                "AWS": [
                    "<DELTEK IAM ROLE ARN>"
                ]
            },
            "Action": [
                "s3:PutObject",
                "s3:ListBucket"
            ],
            "Resource": [
                "arn:aws:s3:::<CLIENT BUCKETNAME>/*",
                "arn:aws:s3:::<CLIENT BUCKETNAME>"
            ]
        }
    ]
}
```

Figure 5: Bucket Policy for empty editor

   - **DELTEK IAM ROLE ARN**: This can be located in your **Welcome Letter** as described at the beginning of Step One.
   - **CLIENT BUCKETNAME**: This is the S3 bucket name of the bucket you are using.

- If there is an existing policy in the editor, add the **DELTEK IAM ROLE ARN** and **CLIENT BUCKETNAME** to grant permission to the Deltek IAM Role

```
,{
    "Sid": "Allow Deltek IAM Role to this S3",
    "Effect": "Allow",
    "Principal": {
        "AWS": [
            "<DELTEK IAM ROLE ARN>"
        ]
    },
    "Action": [
        "s3:PutObject",
        "s3:ListBucket"
    ],
'Resource": [
        "arn:aws:s3:::<CLIENT BUCKETNAME>/*",
        "arn:aws:s3:::<CLIENT BUCKETNAME>"
    ]
}
```

Figure 6: Bucket Policy where there is an existing policy

Note: If you are not familiar with creating AWS policies or require further information, please visit https://awspolicygen.s3.amazonaws.com/policygen.html.

Enter the following criteria to generate an AWS policy.

- **Select Type of Policy**: Select **S3 Bucket Policy** from the drop-down list.
- **Effect**: Select the **Allow** option.
- **Principal**: Enter the Deltek AWS account number (for example, 9999999999).
- **AWS Service**: Tis field is pre-populated with **Amazon S3**.
- **Actions**: Select the **PutObject** and **ListBucket** check boxes from the drop-down list.
- **Amazon Resource Name**: Enter the ARN of the S3 bucket. Comma separated. For example: arn:aws:s3:::<CLIENT BUCKETNAME>/*,arn:aws:s3:::<CLIENT BUCKETNAME>

Step Two: Grant the IAM Role to Use Your KMS

To grant access to your KMS:

1. Go to AWS IAM, and click **Encryption keys**.

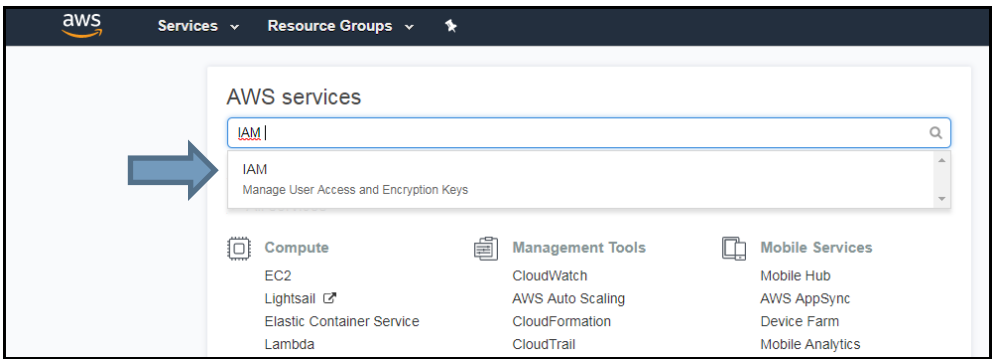


Figure 7: Locate IAM in AWS

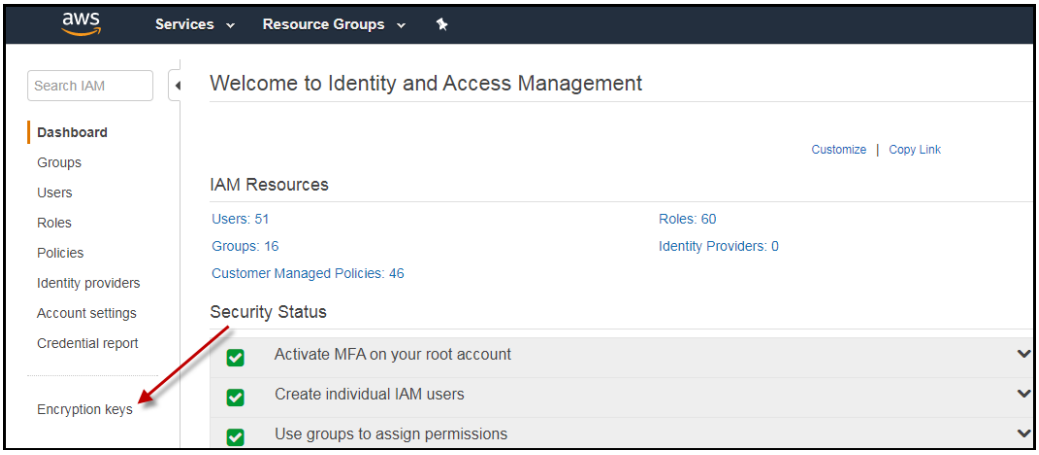


Figure 8: Identity and Access Management

2. In the Encryption Keys list, locate the KMS key.

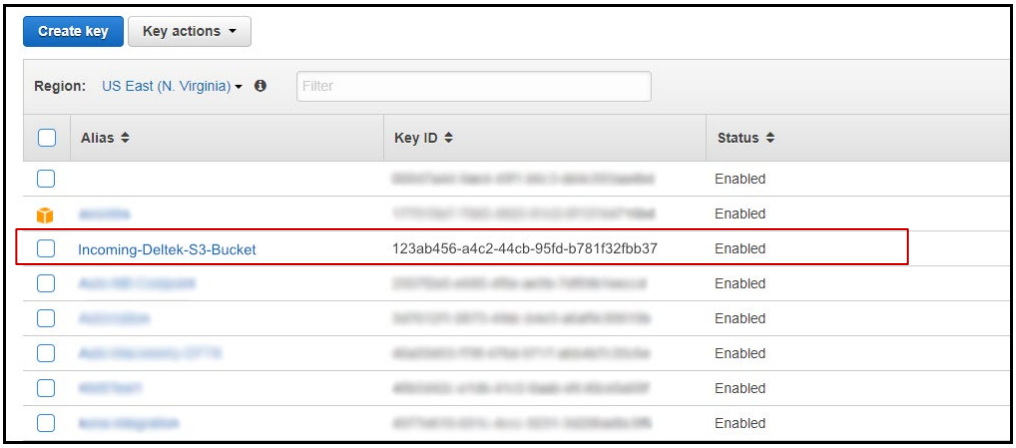
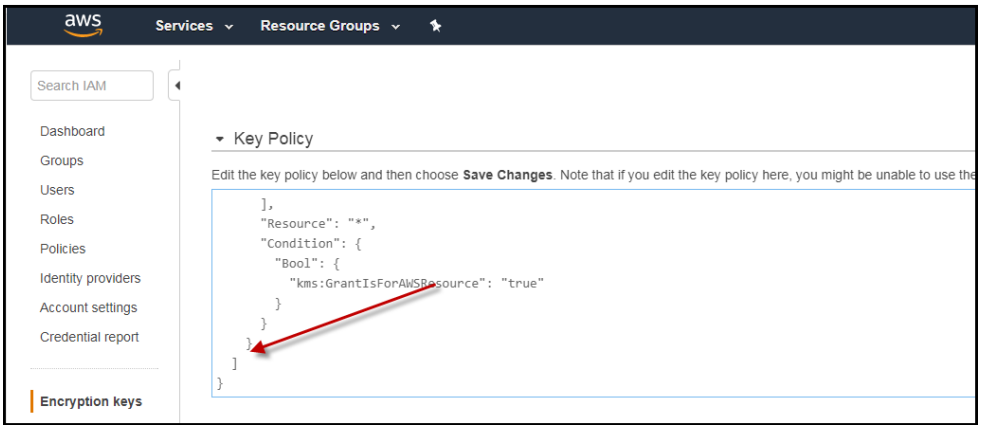


Figure 9: List of Encryption Keys

3. Click the KMS key to open it.
4. Under Key Policy, add the following.
   - **DELTEK IAM ROLE ARN**: This can be located in your **Welcome Letter** as described at the beginning of Step One.

```
,{
  "Sid": "Allow Deltek IAM Role to encrypt using this KMS key",
  "Effect": "Allow",
  "Principal": {
    "AWS": [
      "<DELTEK IAM ROLE ARN>"
    ]
  },
  "Action": [
    "kms:Encrypt",
    "kms:DescribeKey"
  ],
  "Resource": "*",
}
```

It can be added at the very end of an already existing policy.

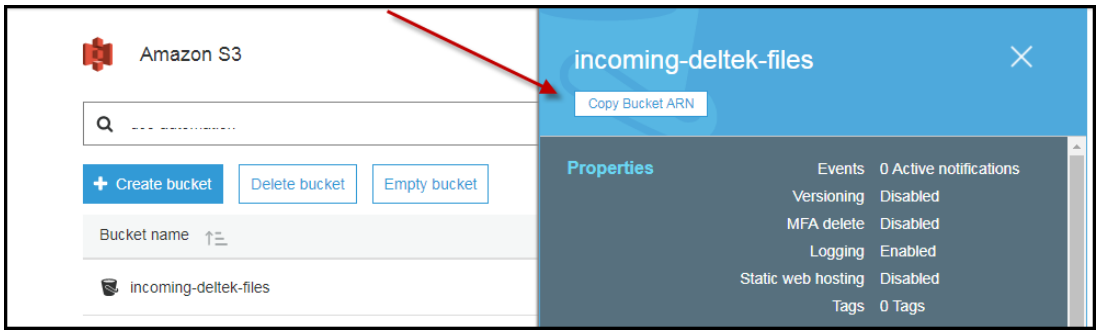


Step Three: Provide Deltek with the ARN and KMS Key for your S3 Bucket

The final step in the process is to submit the Scheduled Database Export Service Request to provide Deltek with the ARN for your S3 bucket and access to encrypt using your KMS key.

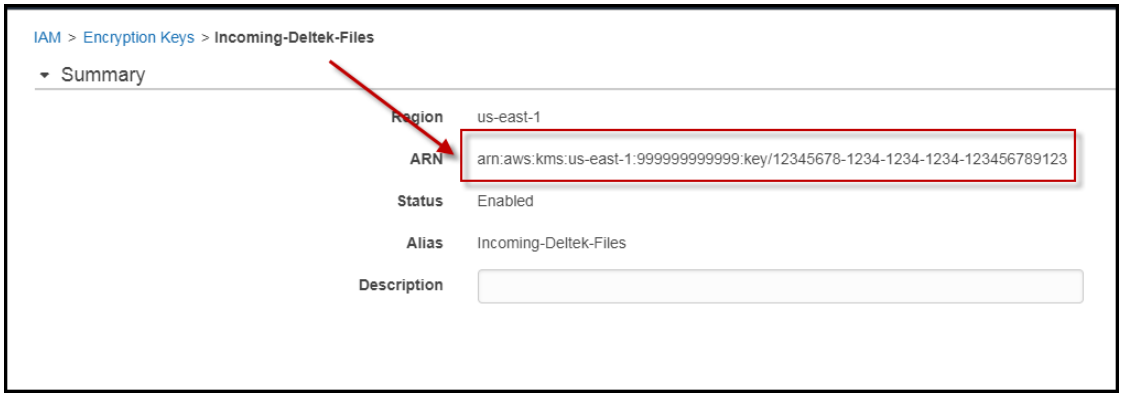
To provide the ARN for your S3 bucket and access to encrypt using your KMS key:

1. Retrieve the ARN for your S3 bucket:
   a. In Amazon S3 under the **Bucket Name**, click **Copy Bucket ARN**.



   b. Paste the Bucket ARM into a local text file so that you have it ready to provide to Deltek.
2. Retrieving the ARN for your KMS Key.

   This will allow Deltek to encrypt the backup as it uploads it to your Amazon S3 bucket.
   a. Navigate to IAM » Encryption Keys » the Bucket you are using to receive database exports:



   b. Copy the ARN and paste it into a local text file so that you have it ready to provide to Deltek.
3. Provide Deltek with the ARN for your S3 Bucket and the ARN for your KMS Key:
   a. Log into the Deltek Support Center website.
   b. Click **Cloud Solutions**, and select either **Costpoint** or **Costpoint Enterprise**.
   c. Complete the Scheduled Database Export service request.

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