Deltek Costpoint® Planning 8.0

Manage Org and Project Budgeting Roles

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Contents

Downloading Deltek Products using Deltek Software Manager

Note: Please be advised that Budgeting and Planning was renamed to Costpoint Planning. Whenever applicable, verbiage was updated throughout the document to reflect this change unless it refers to a specific filename, database, hotfix or exe file.

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login.**
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

   Note: When you log on for the first time, DSM asks you to select a default folder where Deltek products are to be downloaded.

   You can change this folder anytime in the Settings dialog box.

6. In the left pane, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download.

   Options include:

   - **Complete**
   - **Cumulative Updates**
   - **HotFixes**
   - **Sub-Release**

8. In the table, select the check box that corresponds to the Deltek product that you want to download.

   The right pane displays a message stating that the product has been added to the download queue.

   Note: To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

1. In your Web browser, go to https://dsm.deltek.com/DeltekSoftwareManagerLite.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Logon.**
3. When the Deltek Software Manager Lite page displays, select a product from the drop-down list.
4. Click the product type that you want to download.

> **Note:** The download behavior and download folder may differ depending on the browser and browser settings that you are using.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click here.
- To view a tutorial on how to use Deltek Software Manager, click here.
- To view more information on troubleshooting Deltek Software Manager, click here.

> **Note:** When you click a link, you will be asked to log into DSM if you are not already logged in.

Overview

Deltek Costpoint Planning is a Web-based budget and cost reporting application that provides business intelligence and comprehensive project and operations fiscal performance management tools. Effective management requires collaboration and cooperation among all members of the project management community within the government contractor organization. Costpoint Planning provides the substance of that collaboration.

Collaboration depends upon the management tradition and authority structure that have been established within the organization, both of which can be evolving over time. Costpoint Planning users are either part of that authority structure or they are acting in direct support of its participating members. Therefore each Costpoint Planning user must have an established role that reflects legitimate management authority.

This guide provides information on managing roles in Project and Organizational budgeting.

You will also find information on logging on to Costpoint Planning and contacting Deltek Customer Care and other client services.

If you have not yet installed Deltek Costpoint Planning, please refer to your installation instructions.

Generic Staff Settings

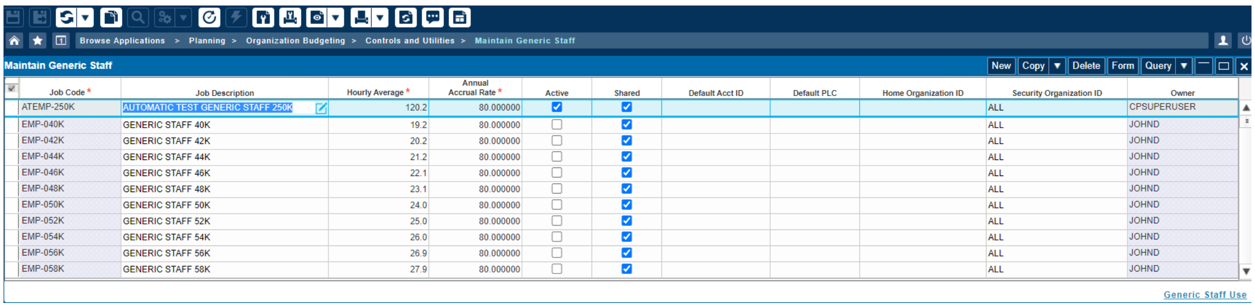
This section discusses the configuration of global generic staff, which is integral component of both Costpoint Planning's project and organization budgeting processes. You should load a generic staff list that reflects the labor categories and associated hourly cost and billing rates used by the organization contracts/proposal shop.

Maintain Generic Staff

The Maintain Generic Staff table report allows you to establish generic job categories that are useful when you assign people that you do not already have on staff. It also allows you to reflect future growth in the company. It is important to populate this data before Costpoint Planning users begin creating budgets.

To maintain the Generic Staff Table:

1. Click **Planning » Organization Budgeting » Controls and Utilities » Maintain Generic Staff**.



Job Code *	Job Description	Hourly Average *	Annual Accrual Rate *	Active	Shared	Default Acct ID	Default PLC	Home Organization ID	Security Organization ID	Owner
ATEMP-250K	AUTOMATIC TEST GENERIC STAFF 250K	120.2	80.000000						ALL	CPSUPERUSER
EMP-040K	GENERIC STAFF 40K	19.2	80.000000						ALL	JOHND
EMP-042K	GENERIC STAFF 42K	20.2	80.000000						ALL	JOHND
EMP-044K	GENERIC STAFF 44K	21.2	80.000000						ALL	JOHND
EMP-046K	GENERIC STAFF 46K	22.1	80.000000						ALL	JOHND
EMP-048K	GENERIC STAFF 48K	23.1	80.000000						ALL	JOHND
EMP-050K	GENERIC STAFF 50K	24.0	80.000000						ALL	JOHND
EMP-052K	GENERIC STAFF 52K	25.0	80.000000						ALL	JOHND
EMP-054K	GENERIC STAFF 54K	26.0	80.000000						ALL	JOHND
EMP-056K	GENERIC STAFF 56K	26.9	80.000000						ALL	JOHND
EMP-058K	GENERIC STAFF 58K	27.9	80.000000						ALL	JOHND

2. Click the row where you want to make a change.
   - Generic Staff are assigned a General Ledger ID in your accounting system. Costpoint Planning grabs that data for this table.
   - The **Accrual Rate** represents the number of PTO hours per year.

   The default equates to two weeks of vacation (80 hours) plus one week of sick leave (40 hours), which equals 120 hours.

3. Enter or edit information in the following fields:
   - **Shared** — Select this check box to share the generic staff. Sharing instructs Deltek Costpoint Planning to allow this entry to appear in any drop-down lists where appropriate.
   - **Security Organization ID** — Select the level for this entry from the drop-down list.
     - The generic staff will be able to access anything at and below the level you choose.
     - If you have designated that this generic staff be shared, Costpoint Planning allows it to be shared according to the security level you designate.
   - **Active** — Select this check box to designate if the generic staff is active or not.
4. Enter a Job Code, Hourly Average and Accrual Rate (required fields) for any new generic staff you want to create.
5. Click **Close** to close the table.

Project-Specific Settings

To access Project-Specific Settings, click **Planning » Administration » Administration Controls » Maintain Project Budget Security.**

These settings determine how Costpoint Planning's project budget tools function and who can access that functionality. They also allow fine-tuning of the basic security settings for user access to project budgeting and reporting functions. In addition, accounting system-specified alternative project structures can be referenced so that they can be reflected in Costpoint Planning's project navigation structure.

Costpoint Planning users, with a focus on the Project Management context, are linked to the project manager authority structure established in your accounting system. However, this authority structure does not reflect a workflow process for originating and approving project budgets and estimates-to-complete.

These settings can be established in Costpoint Planning with the Manage Additional Project Budget Approvers screen. In addition, Project Manager Matrix Rights allows project managers to access staff resources for budgeting purposes that are not included in their security organization.

If you have an alternative project structure established in your accounting system, Costpoint Planning allows this structure to be mapped into its project navigation structure. You may have multiple alternate project structures established for reporting purposes.

If more than one structure includes the same lowest level project task ID, then only one structure should be selected for mapping into Costpoint Planning. The Specify Valid WBS IDs option is used for this purpose.

Why Project-Specific Settings Are Important

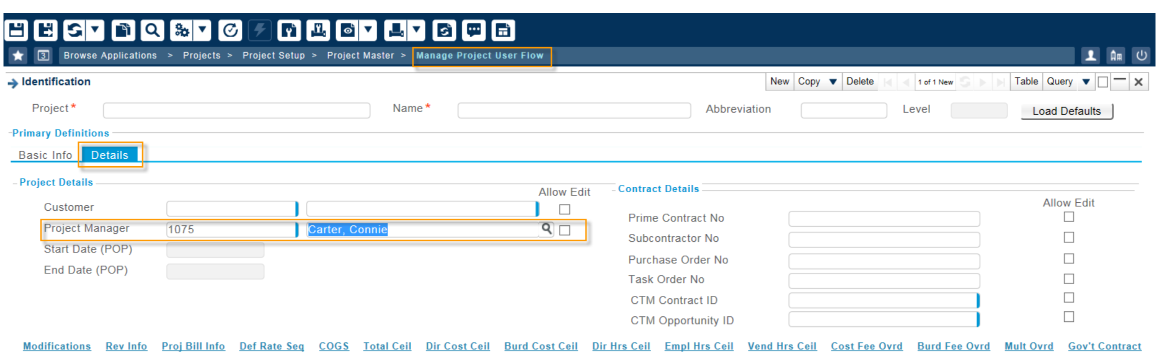
These settings determine how project budgeting tools work and who can access these tools. Establishing and managing project budgets are a critical part of establishing a cooperative, collaborative process of project financial accountability.

This ultimately can impact your company's ability to ensure that projects are executed within available funds in a method that preserves profitability.

It is up to you to determine the appropriate management authority structure that will underlie the budget creation and workflow process.

As you proceed, take note of the following:

- Costpoint Planning assigns project managers in the project manager field in Project Master as budget approvers.



- Approval authority for lower level project managers must be created in the Costpoint Planning database because it does not exist in the accounting system.

- It is up to you to determine the appropriate management authority structure that will underlie the budget creation and workflow process.
- Approval is necessary to establish a frozen budget, (a requirement of the Estimate-at-Complete process)

Maintain Project Budget Security

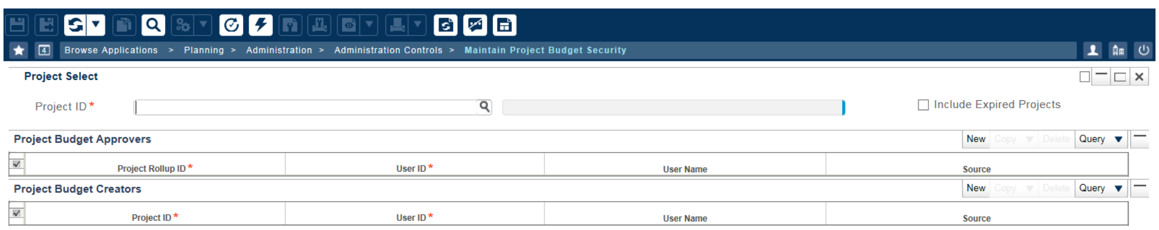
Costpoint Planning assigns the highest level project manager as a budget approver. Approval authority must be created in the Costpoint Planning database for managers assigned at roll-up levels. It is up to you to determine the appropriate management authority structure that will underlie the budget creation and workflow process.

Approval is necessary to establish a frozen budget (a requirement of the Estimate-at-Complete process) and is critical to fulfilling Earned Value Management (EVM) requirements, if they exist.

To add additional project budget approvers and creators:

1. Click **Planning » Administration » Administration Controls » Maintain Project Budget Security**

   The Maintain Project Budget Security screen displays.

2. Click **New** from the toolbar. A new row is added to the table.
3. Enter, or click to select, details for the Project, User ID, and User Name columns.
4. Click **Save**.

Manage Project Manager Matrix Rights

The Manage Project Manager Matrix Rights screen allows you to control which employees display in the budget employee drop-down list, allowing managers to determine employees outside their security org.

To add project manager matrix rights:

1. Click **Planning » Administration » Administration Controls » Manage Project Manager Matrix Rights.**

2. Click **New** from the toolbar. A new row is added to the table.
3. Enter, or click  to select, details for the User ID, User Name, and Org ID columns.
4. Click  **Save**.

Organization-Specific Settings

Some of these settings determine how Costpoint Planning's organization budget tools function and who can access that functionality. They also allow the fine-tuning of the basic security settings for user access to organization budgeting and reporting functions. In addition, these settings allow the processing of mass changes applied to organization budget assumptions through global automated change processes, as opposed to individual organization inputs.

Costpoint Planning users, with a focus on the Organization Management Context, are linked to an organization manager authority structure that must be created since it is not recorded in your accounting system. This enables you to set up a workflow process for originating and approving organization budgets and outlooks or re-forecasts. These settings can be established with the Maintain Org Budget Approvers function.

Included in other org-specific settings are functions to manage the accounts that are included in the budget template for each organization and other factors that determine how costs and revenues are calculated by the organization budget tool.

Why Organization-Specific Settings Are Important

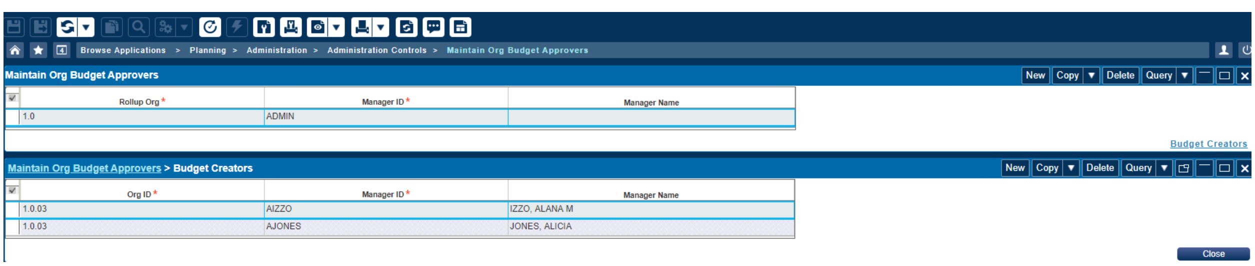
These settings determine how organization budgeting tools work and who can access these tools. Establishing and managing organization budgets are a critical part of establishing a cooperative, collaborative process of organization financial accountability. This ultimately can impact your company's ability to ensure that indirect expenses are properly absorbed through the billing process to maximize profitability.

Maintain Org Budget Approvers

Since most accounting systems do not have detailed records of an Org./OBS management authority structure, use the Maintain Org Budget Approvers feature to record those details in the database to support the budgeting process.

To maintain organization budget approvers:

1. Click **Planning » Administration » Administration Controls » Maintain Org Budget Approvers**.



2. To change any of the information in the list, take the following actions:
   - Click **Delete** for the user you want to remove. The user's information displays in the fields to the right.
   - Click **Copy** to copy record, copy data to excel, or copy data to paste into a new record.

   Costpoint Planning lets you know the change was made.
3. To add Budget Creators under each approver:

   a. Click the **Budget Creators** link.

b. In the Budget Creators table, click **New**.

c. Enter, or click to select, the **Org ID**, **Manager ID**, and **Manager Name** information.

Org ID *	Manager ID *	Manager Name
01.01	BUYER	
01.01.01	MANAGER	
01.01.01	REQ	
01.01.02	DRZ	DRZ
01.01.04	CONT_MGR	
01.02	REQ	
01.02.05	EMPL	
01.02.06	AP	

d. Click **Save**.

Maintain Special Org Reporting Rights

Use the Maintain Special Org Reporting Rights feature to assign access to another org level to employees on a temporary basis, which impacts both the Org context and the Proj context.

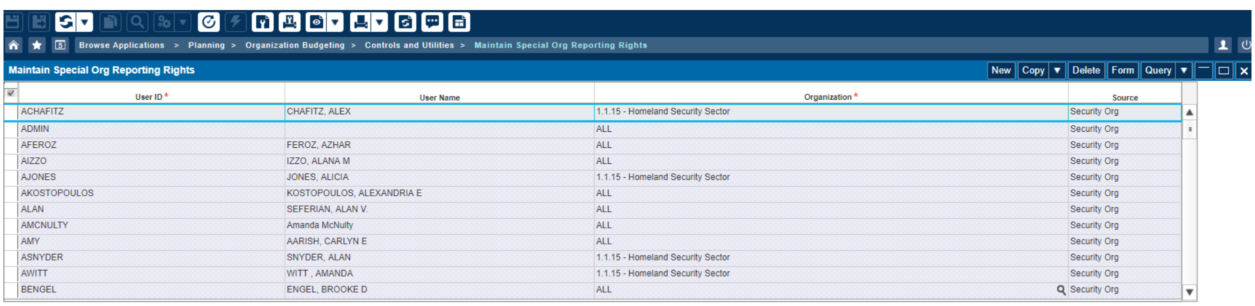
- In Organization Budgeting, you will be able to run reports against the added Org.
- In Project Budgeting, you will be able to run reports against any project that belongs to that added Org.

This functionality does not grant the user rights to see employees in that Org in the employee drop-down list in the budget tool.

You can remove access later.

To maintain special organization reporting rights:

1. Click **Planning » Organization Budgeting » Controls and Utilities » Maintain Special Org Reporting Rights.**



User ID *	User Name	Organization *	Source
ACHAFITZ	CHAFITZ, ALEX	1.1.15 - Homeland Security Sector	Security Org
ADMIN		ALL	Security Org
AFEROZ	FEROZ, AZHAR	ALL	Security Org
AIZZO	IZZO, ALANA M	ALL	Security Org
AJONES	JONES, ALICIA	1.1.15 - Homeland Security Sector	Security Org
AKOSTOPOULOS	KOSTOPOULOS, ALEXANDRIA E	ALL	Security Org
ALAN	SEFERIAN, ALAN V.	ALL	Security Org
AMCNULTY	Amanda McNulty	ALL	Security Org
AMY	AARISH, CARLYN E	ALL	Security Org
ASNYDER	SNYDER, ALAN	1.1.15 - Homeland Security Sector	Security Org
AWITT	WITT , AMANDA	1.1.15 - Homeland Security Sector	Security Org
BENGEL	ENGEL, BROOKE D	ALL	Security Org

2. Click to add **User ID**, **User Name**, and **Organization** details.

3. Click **Save**.

4. To delete employees who are assigned an org level here at any time, click **Delete** for the appropriate employee.

Project Manager Administrative Options

As a project manager, you have been established as an authority over what must be accomplished on behalf of the customer, who will be participating in the effort, and what funds will be consumed during the process.

It is up to you to make sure that your authority as a Costpoint Planning user is not compromised. Changing your password on a regular basis can contribute greatly to limiting unauthorized access to the details of your project's cost and performance.

When it is necessary to share your authority as a project manager with other trusted support staff, Deltek Costpoint Planning provides a method to manage the sharing process. Through this process, you are able to assign access to your projects to other Costpoint Planning users whose user security settings lack access rights.

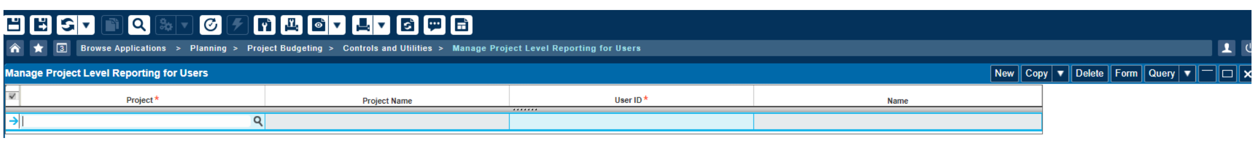
Managing projects requires cooperation and collaboration with other staff. Your accounting system may not reflect these necessary relationships. Costpoint Planning allows you to establish and manage these relationships so that you can take full advantage of the teamwork that you deem appropriate.

Manage Project Level Users

Use this screen to add project level reporting rights for users, allowing them to view additional projects and to share access with other users on multiple projects.

To share access with other users on multiple projects:

1. Click **Planning » Project Budgeting » Controls and Utilities » Manage Project Level Reporting for Users.**



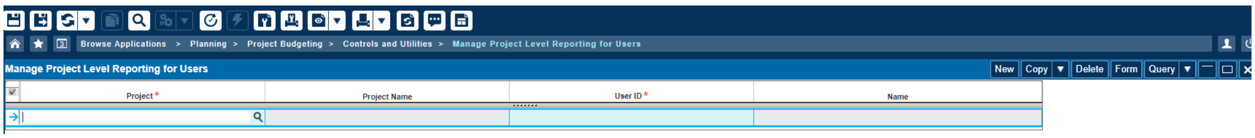
2. In the **Projects** column, enter, or click to select, the projects to which users are going to have access.
3. In the **User ID** column, enter, or click to select, the users who are going to be allowed access to your projects.
4. Click **Save**.

Delete Project Level Users

You use this action to take away access rights to projects. Deleting users will not take effect until the following day—after your Costpoint Planning data has been updated.

To remove shared access for specific Costpoint Planning users:

1. Click **Projects » Project Budgeting » Controls and Utilities » Manage Project Level Reporting for Users.**



2. Select the row of the user you want to remove from having access to your projects.
3. Click **Delete** from the toolbar next to each user you want to remove from having access to your projects.
4. When you click **Delete**, Costpoint Planning lets you know the action was successful.
   - You must delete users one at a time.
   - Click **Undelete** to cancel the delete action.

Changes made on this screen will not take effect until table update processing is run.

5. Click **OK** to close the window.

Appendix A: 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.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

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.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com