Deltek

Deltek Costpoint Business Intelligence 8.0

Post Installation and Configuration Guide for On-premises Users

September 1, 2020

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About this Guide

Welcome to the Costpoint Business Intelligence 8.0 Post Installation and Configuration Guide.

This guide will walk you through the initial setup of Costpoint Business Intelligence so your environment is secured before you allow users into Costpoint Business Intelligence to run and create reports and dashboards and leverage the built-in security features. Make sure that you have successfully installed Costpoint Business Intelligence 8.0 before you proceed to the procedures found in this guide.

The tasks described in this guide will be implemented by the Costpoint Business Intelligence System Administrators but may need information from other groups in your company.

Prerequisites

Before you can complete the procedures described in this guide, Costpoint Business Intelligence 8.0 must be installed on Costpoint version 8.0.

Make sure you have successfully completed the following:

- Installed Cognos Analytics 11 where the Content Store database and Gateway dispatcher have been updated and configured
- Installed the Costpoint Authentication Provider (CAP) 8.0
- Installed Costpoint 8.0

Overview

In the Post Installation and Configuration phase we explain the new security design and how to apply configuration procedures to establish the appropriate security settings for your organization. This guide will also cover other special topics like configuring Bar Code Fonts.

The steps in the Post Installation and Configuration phase are:

- **Step 1** — Check the Model Security Configuration
- **Step 2** — Complete the Capabilities Security Template
- **Step 3** — Complete the Object Security Template
- **Step 4** — Complete the Security Template for the CER Project Manager Group
- **Step 5** — Assign Costpoint Users to CER User Groups
- **Step 6** — Set Up Current Reporting Period
- **Step 7** — Set the Visibility Filter
- **Step 8** — Map the Costpoint CER User Groups to Cognos User Groups
- **Step 9** — Customize Capability Permissions
- **Step 10** — Customize Secured Feature Permissions
- **Step 11** — Add Everyone and Assign Read Access to the Team Content Folder
- **Step 12** — Validate User Groups
- **Step 13** — Add the Deltek Theme to Cognos Analytics

There are special topics included in this guide that provides more information about Costpoint BI Security.

- Organization, Labor Suppression, and Project Security in Costpoint
- Organization and Project Security in Costpoint Planning
- Detailed Capabilities by Role

Costpoint Business Intelligence Security

There are different types of data security that you can apply in Costpoint Business Intelligence 8.0.

The different types of security that will be addressed in this guide include:

1. **Capability Security** - This type of security utilizes user roles to determine the product capabilities that are available to an end user. For example, does this end user create reports or dashboards or simply run reports that were created by others?
2. **Object Security** - This type of security determines what content an end user can see. User groups based on Costpoint domains are used to establish content security. For example, should the end user be able to access HR, Project, or Accounting type reports?
3. **Model or Row Level Security** - This type of security is enabled in order to restrict the data that an end user can see utilizing settings in Costpoint and Costpoint Planning.

Step 1- Check the Model Security Configuration

Model security is enabled as default. If you do not want to apply it, you can disable model security in Costpoint's Manage BI Settings (BIMCERSETTINGS) screen. The best practice is to keep the model security on.

Note: Skip this procedure if you want to use model security for your Costpoint Business Intelligence implementation. If model security is set to Yes, you must have an org security group assigned to each user or they will not be able to retrieve any data in the models that have data-level security (for example, Projects, Project Planning). In addition, parts security is always applied in Business Intelligence when it is used in Costpoint. See Special Topics for more information about security in Costpoint Business Intelligence.

To disable Model Security:

1. Log in to Costpoint and launch the Manager BI Settings (BIMCERSETTINGS) screen (**Reports and Analytics** » **BI Configuration** » **Configuration** » **Manager BI Settings**).
2. Select **No** in the corresponding fields where you want to disable security.

Field	Description
Enable Costpoint and Planning Model Security	Select **No** to disable model security for the Costpoint and Costpoint Planning models. Model security is enabled by default. **Note:** If you select **No**, only Model Security is disabled. Capability and Object Security are still in place in Costpoint Business Intelligence.

Field	Description
Use CP Organization Security By Module	Select **No** to disable organization security in the new secure models which are: ▪ Accounts Receivable ▪ Accounts Payable ▪ General Ledger ▪ Manufacturing ▪ Materials ▪ Procurement ▪ Projects
Enable T&E Model Security	Select **No** to disable model security for the Time model.

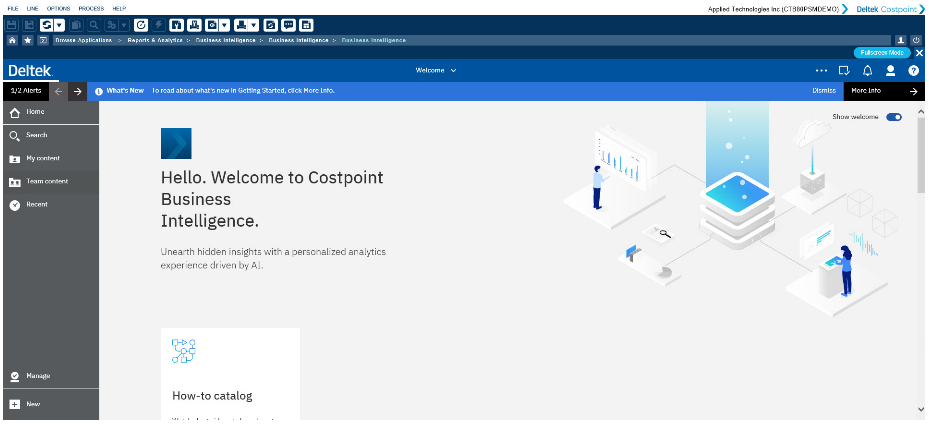
3. Click **Save**.

Assign Costpoint Business Intelligence Rights to the Administrator

In order to access Costpoint Business Intelligence, the Administrator will need to be assigned to CER groups in Costpoint Security.

It is recommended that you as Administrator assign yourself initially to CER__Admin and then to CER__ALL.

You as Administrator should then open Business Intelligence to make sure you can access the initial Costpoint Business Intelligence Welcome Screen.

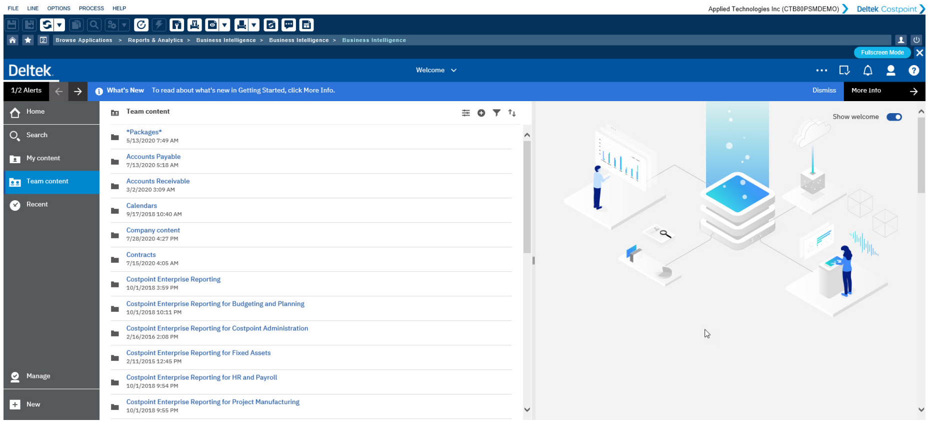


To read about what's new in Getting Started, click More Info.

Hello. Welcome to Costpoint Business Intelligence.

Unearth hidden insights with a personalized analytics experience driven by AI.

Then, click the Team content folder, and you should see the full folder structure.


FILE LINE OPTIONS PROCESS HELP
Applied Technologies Inc (CTB80PSMDEMO)
Deltek Costpoint
Browse Applications > Reports & Analytics > Business Intelligence > Business Intelligence > Business Intelligence
Fullscreen Mode
Deltek
Welcome
1/2 Alerts
What's New
Dismiss
More Info
Home
Search
My content
Team content
Recent
Manage
New
Show welcome

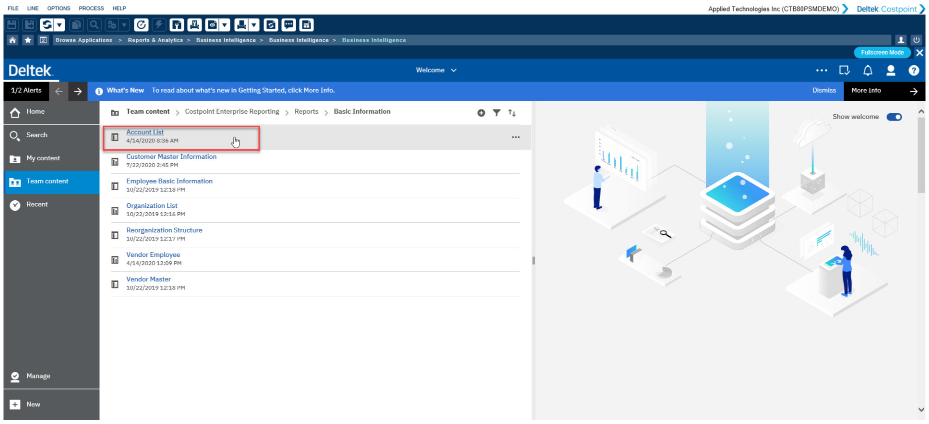
To read about what's new in Getting Started, click More Info.

Team content

- *Packages* 5/13/2020 7:49 AM
- Accounts Payable 7/13/2020 5:18 AM
- Accounts Receivable 3/2/2020 3:09 AM
- Calendars 9/17/2018 10:40 AM
- Company content 7/28/2020 4:27 PM
- Contracts 7/15/2020 4:05 AM
- Costpoint Enterprise Reporting 10/1/2018 3:59 PM
- Costpoint Enterprise Reporting for Budgeting and Planning 10/1/2018 10:11 PM
- Costpoint Enterprise Reporting for Costpoint Administration 2/16/2016 2:08 PM
- Costpoint Enterprise Reporting for Fixed Assets 2/11/2015 12:45 PM
- Costpoint Enterprise Reporting for HR and Payroll 10/1/2018 9:54 PM
- Costpoint Enterprise Reporting for Project Manufacturing 10/1/2018 9:55 PM

Then, run a report to ensure that you can access Costpoint data. Here is how you can run an Account List Report:

First, navigate to the report.

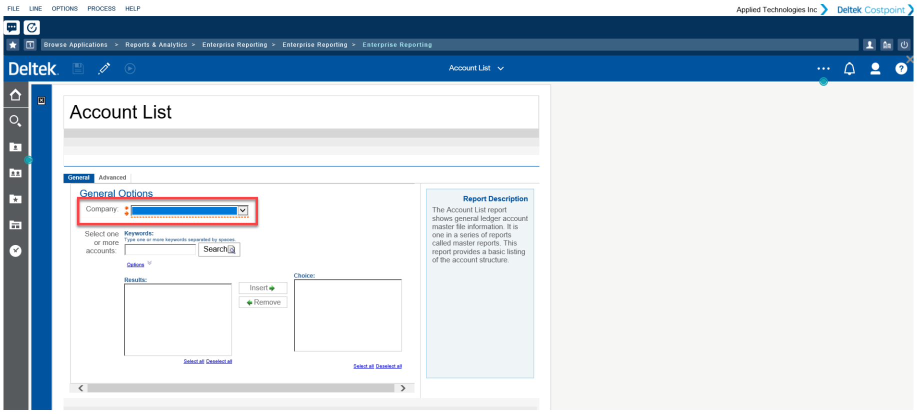

FILE LINE OPTIONS PROCESS HELP
Applied Technologies Inc (CTB80PSMDEMO)
Deltek Costpoint
Browse Applications > Reports & Analytics > Business Intelligence > Business Intelligence > Business Intelligence
Fullscreen Mode
Deltek
Welcome
1/2 Alerts
What's New
Dismiss
More Info
Home
Search
My content
Team content
Recent
Manage
New
Show welcome

To read about what's new in Getting Started, click More Info.

Team content > Costpoint Enterprise Reporting > Reports > Basic Information

- Account List 4/14/2020 8:36 AM
- Customer Master Information 7/22/2020 2:45 PM
- Employee Basic Information 10/22/2019 12:18 PM
- Organization List 10/22/2019 12:16 PM
- Reorganization Structure 10/22/2019 12:17 PM
- Vendor Employee 4/14/2020 12:09 PM
- Vendor Master 10/22/2019 12:18 PM

Then, select the **Company** from the Prompt Page and click **Run Report**. The resulting report will show your account structure and validates you are connecting to your Costpoint data.



Account List

General Options

Company:

Select one or more accounts: Keywords: Type one or more keywords separated by spaces.

Results:

Choice:

Report Description

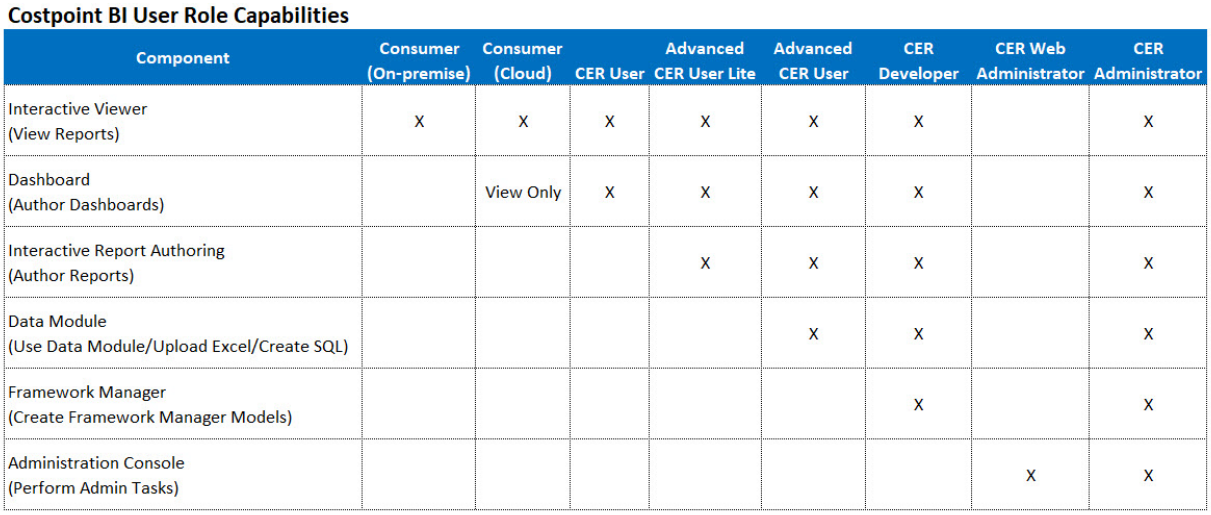
The Account List report shows general ledger account master file information. It is one in a series of reports called master reports. This report provides a basic listing of the account structure.

Now, you are ready to add functional users for Capabilities, Object, and PM Security, where applicable. There is a spreadsheet that accompanies the documentation that makes it easier to set up your user.

Capability Security

For each CER user role, a set of capabilities are assigned that designate the secure features or functions that an end user can perform.

There is a CER user role included in your deployment for each Deltek license type. The table below displays the key functions available with each of the licenses.



Costpoint BI User Role Capabilities

Component	Consumer (On-premise)	Consumer (Cloud)	CER User	Advanced CER User Lite	Advanced CER User	CER Developer	CER Web Administrator	CER Administrator
Interactive Viewer (View Reports)	X	X	X	X	X	X		X
Dashboard (Author Dashboards)		View Only	X	X	X	X		X
Interactive Report Authoring (Author Reports)				X	X	X		X
Data Module (Use Data Module/Upload Excel/Create SQL)					X	X		X
Framework Manager (Create Framework Manager Models)						X		X
Administration Console (Perform Admin Tasks)							X	X

Note: *The Consumer (CER__CONSUMER) user has the least rights, basically someone who can only run and interact with existing reports. While you may not own this type of license and have CER users **(in Bundles) and/or Advanced CER licenses** instead, you might want to limit the capabilities for some individuals who you do not want to access or create dashboards.

**CER User is only available in CER Bundles (restricted).

License Types

Every Costpoint Business Intelligence user should be assigned to one Costpoint BI user role based on the functions they can perform and the license purchased. Costpoint BI roles are depicted by the prefix CER.

The Security Planning Template has been provided for planning your capability security to help ensure license compliance.

- **Consumer (CER__CONSUMER):** This user has the least rights, basically someone who can only run and interact with existing reports and dashboards. While you may not own this type of license and have Costpoint BI users instead, you might want to limit the capabilities for some individuals who you do not want to access dashboards.
- **CER User (CER__USER):** This user is someone who can run and interact with reports and can also create dashboards.
- **Advanced CER User (CER__ADV):** In addition to the capabilities of the Costpoint BI user, this type of user can create and share reports using interactive authoring and access the data module. **Advanced CER User Lite (CER__ADV_LITE)** is also available

and is similar to **Advanced CER User**, but with some limited capabilities such as the inability to use data modules, upload MS Excel, and create SQL.

- **CER Developer (CER__DEV):** This type of user is not included in the typical Costpoint BI bundles but can be purchased separately. In addition to all the capabilities of the Advanced CER user, a developer can use Framework Manager, which allows for custom data model creation.
- **CER Administrator (CER__ADMIN):** Typically, one Administrator license is provided in a Costpoint BI bundle. This user has access to all Costpoint BI capabilities.

For initial setup, you might not want to set up every user versus a sample of users who will be initially testing the system; you can always go back and add other users later.

Interactive Viewer enables a user to interact with the report output (even without report authoring capabilities). With interactive viewer, a user can:

- Change the sort order of a data container
- Set or edit filters
- Change the aggregation
- Group a column
- Change the type of a data container, that is, from a list to a chart
- Save the changes as new report
- Interact with charts

Dashboards help you gain insight into your data at a glance through the use of interactive visualizations that can be arranged on one or more tabs.

Interactive Report Authoring is a web-based report authoring tool that enables developers to construct professional multi-query reports.

Data Module allows some limited web-based modeling capabilities allowing users (without Framework Manager expertise) to leverage data sets or blend data from existing packages.

Framework Manager is a metadata modeling tool for Cognos Analytics 11.

Administrator Console is used to perform tasks such as managing schedules and user accounts, and customizing the product experience and user interface.

Step 2 - Complete the Capabilities Security Template

The Capabilities Template is part of the Security Planning Template which is included in the documentation for this release.

To complete the Capabilities Security Template:

1. Launch the Security Planning Template and open the Capabilities Security tab.
2. Enter the number of licenses purchased by license type.
3. List all Costpoint Business Intelligence users by name.
4. Designate the role or license each user belongs to.
5. Save the completed template for reference later.

Object Security

Deltek delivers content in the form of packages, reports and dashboards organized in folders under **Team Content**.

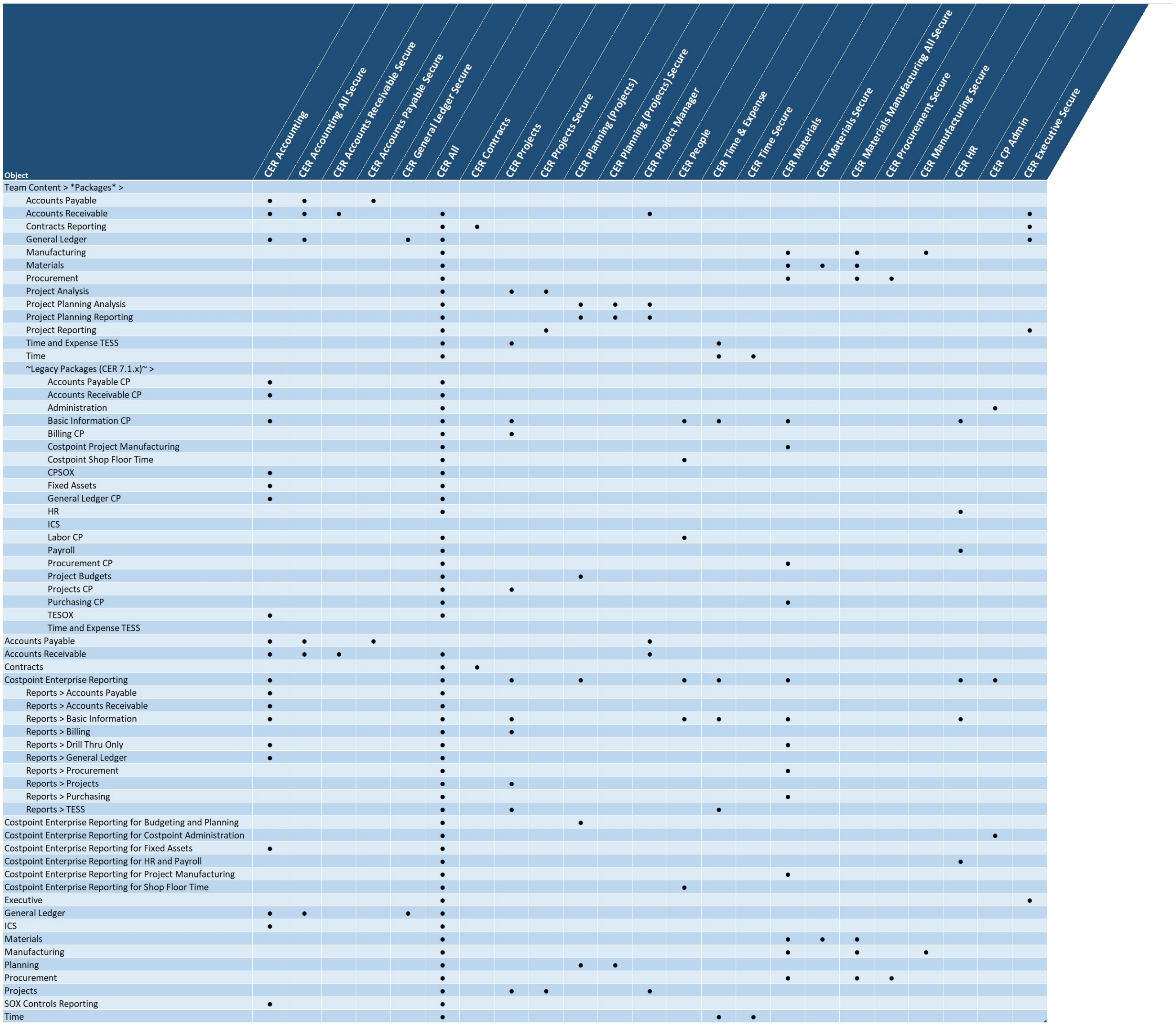
This content comes secured using Costpoint BI or CER user groups included in your deployment. The user groups are based on Costpoint domains. The succeeding table describes the user groups that have permissions to the objects in the Deltek content. The permissions at the parent folder or package will apply to any content contained within.

For example the **Team Content** » **Projects** folder, contains subfolders for packages, reports, and dashboards created from information in the Projects domain. Any user assigned to the **CER Projects** user group will be able to see all this content plus the legacy content as indicated in the table. A **CER Projects** user will see the secured project packages, reports, and dashboards plus all the legacy (or unsecured) project content as indicated in the table.

Alternatively, a user assigned to **CER Projects Secure** will only be limited to the secured Project content found under the **Team Content** » **Projects** folder plus the secured projects packages.

The permissions for all Deltek folders are set as 'RUN only' to prevent changes or modifications to the pre-established value-add which ensures a smoother upgrade path in the future. Customization of the Deltek content must be saved in the **Company content** folder.

> **Note:** Because future Costpoint Business Intelligence upgrades may overwrite the Deltek folders, it is best practice to use the **Company content** folder to store customization.



Object	CER Accounting	CER Accounting All Secure	CER Accounts Receivable Secure	CER Accounts Payable Secure	CER General Ledger Secure	CER All	CER Contracts	CER Projects	CER Projects Secure	CER Planning (Projects)	CER Planning (Projects) Secure	CER Project Manager	CER People	CER Time & Expense	CER Time Secure	CER Materials	CER Materials Secure	CER Materials Manufacturing All Secure	CER Procurement Secure	CER Manufacturing Secure	CER HR	CER CP Admin	CER Executive Secure
Team Content > *Packages* >																							
Accounts Payable	●	●		●																			
Accounts Receivable	●	●	●			●						●											●
Contracts Reporting						●	●																●
General Ledger	●	●			●	●																	●
Manufacturing						●										●		●		●			
Materials						●										●	●	●					
Procurement						●										●		●	●				
Project Analysis						●		●	●														
Project Planning Analysis						●				●	●	●											
Project Planning Reporting						●				●	●	●											
Project Reporting						●			●														●
Time and Expense TESS						●		●						●									
Time						●								●	●								
~Legacy Packages (CER 7.1.x)~ >																							
Accounts Payable CP	●					●																	
Accounts Receivable CP	●					●																	
Administration						●																●	
Basic Information CP	●					●		●					●	●		●					●		
Billing CP						●		●															
Costpoint Project Manufacturing						●										●							
Costpoint Shop Floor Time						●							●										
CPSOX	●					●																	
Fixed Assets	●					●																	
General Ledger CP	●					●																	
HR						●															●		
ICS																							
Labor CP						●							●										
Payroll						●															●		
Procurement CP						●										●							
Project Budgets						●				●													
Projects CP						●		●															
Purchasing CP						●										●							
TESOX	●					●																	
Time and Expense TESS																							
Accounts Payable	●	●		●								●											
Accounts Receivable	●	●	●			●						●											
Contracts						●	●																
Costpoint Enterprise Reporting	●					●		●		●			●	●		●					●	●	
Reports > Accounts Payable	●					●																	
Reports > Accounts Receivable	●					●																	
Reports > Basic Information	●					●		●					●	●		●					●		
Reports > Billing						●		●															
Reports > Drill Thru Only	●					●										●							
Reports > General Ledger	●					●																	
Reports > Procurement						●										●							
Reports > Projects						●		●															
Reports > Purchasing						●										●							
Reports > TESS						●		●						●									
Costpoint Enterprise Reporting for Budgeting and Planning						●				●													
Costpoint Enterprise Reporting for Costpoint Administration						●																●	
Costpoint Enterprise Reporting for Fixed Assets	●					●																	
Costpoint Enterprise Reporting for HR and Payroll						●															●		
Costpoint Enterprise Reporting for Project Manufacturing						●										●							
Costpoint Enterprise Reporting for Shop Floor Time						●							●										
Executive						●																	●
General Ledger	●	●			●	●																	
ICS	●					●																	
Materials						●										●	●	●					
Manufacturing						●										●		●		●			
Planning						●				●	●												
Procurement						●										●		●	●				
Projects						●		●	●			●											
SOX Controls Reporting	●					●																	
Time						●								●	●								

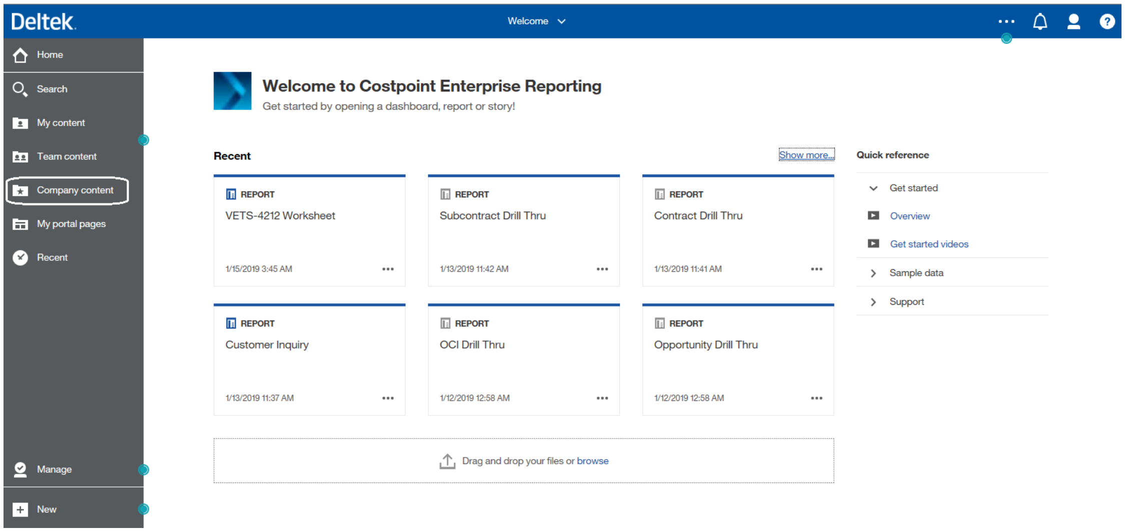
A user must belong to at least one of these groups in order to see any Deltek content. A single user can be assigned to multiple groups. Use the Security Planning Template to plan which objects a user should have access to. If a user is assigned to one of these groups, they have access to all the reports and models for those objects. Please consider this before adding someone to one of the Object groups.

If all the content of an Object group is not assigned to a user, you do not have to assign them to a CER object group. You can only copy the content you would like them to see into the **Company content** folder. The **Company content** folder is managed by the administrator or other users designated by the administrator who can give rights to users or user groups to copies of dashboards/reports or custom dashboards/reports. So if you have a special use case that is not supported by Deltek security or folder organization, you have this area that is open to you to organize and secure based on your requirements.

Company Content

As best practice, Deltek recommends that custom content is separate from Deltek provided content. For this purpose, the **Company content** folder is provided in Costpoint Business Intelligence 8.0.

The Company content folder is included in your navigation pane that you can use for your company's own folder structure.



Administrators have full rights to this folder where they can assign and manage permissions.

Step 3 - Complete the Object Security Template

The Object Security Template is part of the Security Planning Template which is included in the documentation for this release.

To complete the Object Security template:

1. Launch the Security Planning Template and open the Object Security tab.
2. List all Costpoint Business Intelligence users by name.

   > **Note:** You can add users to all the groups and leave the CER__PM_MGR column for now. You will use this column in the **Step 4 - Complete the Security Template for the CER Project Manager Group** section.

3. Designate the user group that each user belongs to.
4. Save the completed template for reference later.

Model or Row Level Security

This security could also be called data security as it limits the data that is available to an end user based on Costpoint, Costpoint Planning, and Time & Expense settings.

> **Note:** Model/Row Level Security only applies to the Models/Reports/Dashboards contained in the secure areas such as General Ledger, Planning, Projects and others.

There are different aspects of model security.

1. **Labor Suppression** - Restricts the ability to see labor rates and dollars at the employee level using the labor suppression flag settings in Costpoint. In Costpoint Business Intelligence, the rate/cost of employees are hidden in reports when Labor Suppression is in use. See Special Topic 1 for how to leverage this capability.
2. **Organizational Security** - Restricts data based on the user's organization rights established in Costpoint or Costpoint Planning. If Organizational security is not established in Costpoint or Costpoint Planning, Costpoint Business Intelligence models will not be able to restrict data by organization or company.

   For data models that use Costpoint as source, Costpoint Organization Security is enforced. If you are not planning on using this type of security, no setup or changes are required. See Special Topic 1 for more information.

   For data models that use Planning as source, Costpoint Business Intelligence uses information from the Planning setup. See Special Topic 2 for more information.

   > **Note:** Multi-company security for Costpoint and Costpoint Planning is not enforced in Costpoint Business Intelligence.

3. **Project Security** - Restricts project data.
4. **Parts Security** - Restricts part data in support of International Traffic in Arms Regulation (ITAR).
5. **Functional Role** - Restricts data based on user's functional role.

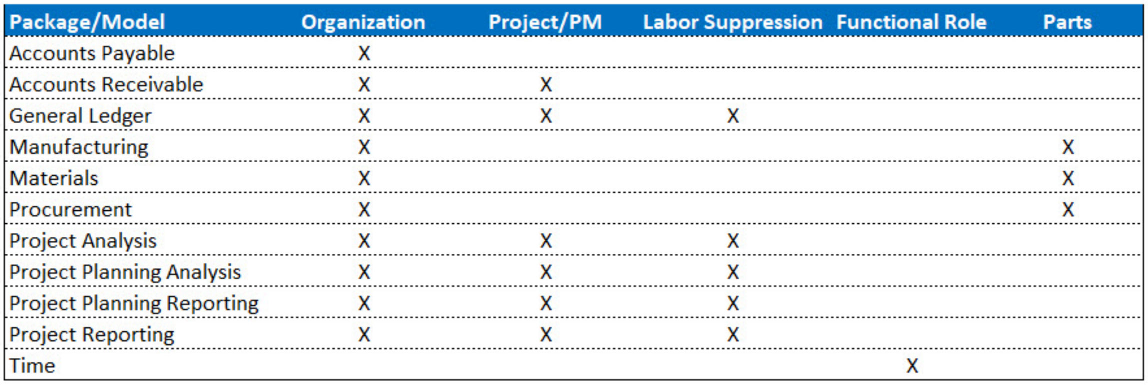
In Planning, there is no specific capability for project security, however, organization security and project exclusion can, in effect, limit what a user sees relating to projects. See Special Topics for more details on setting up security in Planning.

To restrict access to projects in the **Projects**, **General Ledger**, and the **Accounts Receivable** folders where the user is set up as Project Manager, you will simply need to assign them to the CER__PM_MGR. In order to offer some project security options in Costpoint Business Intelligence, the assigned project manager of the project is used to determine project rights.

> **Note:** Project Manager Security only shows the project WBS elements where they are assigned as PM, so if there are multiple PMs assigned to a single project structure, those PMs will not see the entire project.

Matrix for Secure Models

Different types of model and/or row level security are applied to the secure models or package in Costpoint Business Intelligence with the exception of the Contracts Reporting package.



Package/Model	Organization	Project/PM	Labor Suppression	Functional Role	Parts
Accounts Payable	X				
Accounts Receivable	X	X			
General Ledger	X	X	X		
Manufacturing	X				X
Materials	X				X
Procurement	X				X
Project Analysis	X	X	X		
Project Planning Analysis	X	X	X		
Project Planning Reporting	X	X	X		
Project Reporting	X	X	X		
Time				X	

The rest of the models have object and capability security.

- Costpoint Enterprise Reporting
- Costpoint Enterprise Reporting for Budgeting and Planning
- Costpoint Enterprise Reporting for Fixed Assets
- Costpoint Enterprise Reporting for HR and Payroll
- ICS Core
- ICS-Presentation
- Costpoint Enterprise Reporting for Costpoint Project Manufacturing
- Costpoint Enterprise Reporting for Shop Floor Time
- Costpoint SOX
- TE SOX
- Contracts and Opportunities

Step 4 - Complete the Security Template for the CER Project Manager Group

If you want to apply Model Security, complete the Object Security tab of the Security Planning Template to create the list of users that will be part of the CER Project Manager group.

To complete the Security Template for the CER Project Manager Group:

1. Launch the Security Planning Template and open the Object Security tab.
2. List all Costpoint Business Intelligence users by name that will be part of the CER Project Manager (CER__PROJ_MGR) group.
3. Save the completed template for reference later.

Step 5 - Assign Users to Costpoint User Groups

After completing the plan and templates for the various security elements, you can start with the actual configuration set up by first assigning users to user groups.

Use the completed Security Planning Template as reference when you perform this procedure.

To assign existing Costpoint users to CER User Groups:

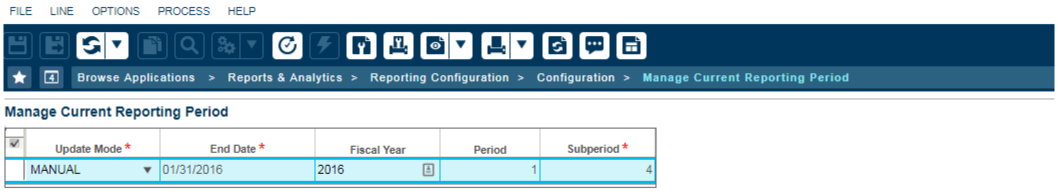
1. Log on to Costpoint and open Manage User Groups (SYMGRP) screen.
2. Query the CER User Group to which you want to assign existing users.

   > **Note:** The CER User Groups in Costpoint start with 'CER__'. Take note of the double underscore.

3. Once the CER User Group has been selected, click the **Assign Users to Group** subtask.
4. Click the **New** button in the **Assign Users to Groups** table window.
5. Enter or select the user and enter the **Company**.
6. Click **Save & Continue**.
7. Repeat steps 2 to 6 until you have assigned all users to the CER User Groups.

Step 6 - Set Up Current Reporting Period

Use the Manage Current Reporting Period (BIMRPTCURPD) application in Costpoint to set up the period that Costpoint Business Intelligence will use in reporting.


FILE
LINE
OPTIONS
PROCESS
HELP
Browse Applications > Reports & Analytics > Reporting Configuration > Configuration > Manage Current Reporting Period

Manage Current Reporting Period

☑	Update Mode *	End Date *	Fiscal Year	Period	Subperiod *
	MANUAL ▼	01/31/2016	2016	1	4

To set up the Costpoint Business Intelligence current reporting period:

1. In Costpoint, launch the Manage Current Reporting Period (BIMRPTCURPD) application (**Reports and Analytics** » **BI Configuration** » **Configuration** » **Manage Current Reporting Period**).
2. Enter the relevant information in the fields of the screen.

Field	Description
Update Mode	Select either **Auto** or **Manual**. Deltek recommends that you select **Manual**, so you can set the **End Date**, **Fiscal Year**, **Period**, and **Subperiod** of your choice.

Field	Description
	Note: It is recommended that you use the **Manual** setting since the administrator can then control when the reports and dashboards run when the current period is finished, which can vary period to period. This setting controls reports and dashboards that use the field **Current Period or Year** settings. This means you do not need to reset the field each month when you access the data. If you select **Auto** in the **Update Mode** field, the default values set on the Manage Current Reporting Period screen are based on the values of your accounting periods in Costpoint. The **End Date** is set to the closest end date to today's date. For example, if today's date is July 10, 2018, the end date will be **July 31, 2018**. This is because it is the closest end date and is greater than July 10, 2018. Note that the current period screen in Planning should also set to the same period. This screen is found at **Planning** » **Administration** » **Administration Controls** » **Maintain Current Period**. This setting controls the updating of the reporting tables and is separate from the Costpoint Business Intelligence Current Period.
End Date	Enter the end date for the current reporting period .
Fiscal Year	Enter the fiscal year for the current reporting period.
Period	Enter the period for the current reporting period.
Subperiod	Enter the subperiod for the current reporting period.

3. Click **Save**.

Portal Visibility Filter

The Portal Visibility Filter is a way to manage which content, report, and folders users can see in Costpoint Business Intelligence.

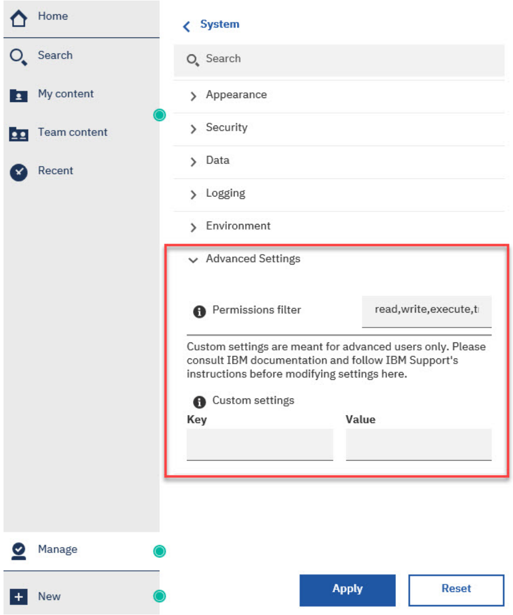
The default filters are read, write, execute, traverse, and setPolicy in Costpoint Business Intelligence, there are business cases where filters need to work alongside permissions and additional steps need to be performed.

Step 7 - Set the Visibility Filter

As default, the **Content_Service.permissionsFilter** parameter has values: read, write, execute, traverse, and setPolicy. In Costpoint Business Intelligence, you need to customize the values to read, write, and setPolicy in order for the permissions and visibility to work.

To change the parameter value:

1. In Costpoint BI, go to **Manage** » **Configuration** » **System** » **Advance Settings**



Permissions filter read,write,execute,t

Custom settings are meant for advanced users only. Please consult IBM documentation and follow IBM Support's instructions before modifying settings here.

2. Enter **Content_Service.permissionsFilter** in the **Key** field.
3. Enter the new values **read,write,setPolicy** in the **Value** field.
4. Click **Apply**.
5. Wait 20 seconds.
6. Log out.

Step 8 - Map the Costpoint CER User Groups to Cognos User Groups

Create the link between the user groups in Costpoint to the Cognos user groups. In this way, the Costpoint user groups can be in sync with the CER user groups. This is a one-time setup that needs to be performed by on premise customers only.

> **Note:** For each Costpoint CER User Group, there is a corresponding Cognos User Group with the same name. For example, the **CER Projects** in Costpoint CER User Group corresponds to the **CER Projects** in the Cognos User Group.

To map the Costpoint CER User Groups to Cognos User Groups:

1. In Costpoint BI, go to **Manage** » **Administration Console**.
2. In IBM Cognos Administration, click the **Security** tab.
3. Go to the Cognos User Group that you want to map with Costpoint CER User Group and open it.

   For example, if you want to map **CER Projects**, go to **Cognos** » **Deltek** » **CER Projects**.

   See the table at the end of the procedure as guide.
4. Once the user group is opened (for example, CER Projects), click the **Members** tab.
5. Click **Add...**.
6. In the **Available entries** box on the left, go to **CAP** » **Deltek Groups**.
7. Select the Costpoint CER User Group that you want to map to your Cognos Group. For example, **CER Projects**.
8. Click the yellow arrow to transfer the selected user group to the **Selected entries** box on the right. Click **OK**.
9. Click **OK** again to close the Properties page for the User Group.
10. Repeat steps 3 to 10 until all Costpoint CER User Groups are mapped to Cognos User Groups.

Cognos User Group	Costpoint Cognos User Group(CAP)
Under **Cognos** » **Deltek** » **CER Accounting**	**CAP** » **Deltek Group** » **CER Accounting**
Under **Cognos** » **Deltek** » **CER Accounting All Secure**	**CAP** » **Deltek Group** » **CER Accounting All Secure**
Under **Cognos** » **Deltek** » **CER Accounts Payable Secure**	**CAP** » **Deltek Group** » **CER Accounts Payable Secure**
Under **Cognos** » **Deltek** » **CER Accounts Receivable Secure**	**CAP** » **Deltek Group** » **CER Accounts Receivable Secure**
Under **Cognos** » **Deltek** » **CER Advanced Lite**	**CAP** » **Deltek Group** » **CER Advanced Lite**

Cognos User Group	Costpoint Cognos User Group(CAP)
Under **Cognos** » **Deltek** » **CER Advanced User**	**CAP** » **Deltek Group** » **CER Advanced User**
Under **Cognos** » **Deltek** » **CER All**	**CAP** » **Deltek Group** » **CER All**
Under **Cognos** » **Deltek** » **CER CP Administrator**	**CAP** » **Deltek Group** » **CER CP Administrator**
Under **Cognos** » **Deltek** » **CER Cloud Administrator**	**CAP** » **Deltek Group** » **CER Cloud Administrator** *No need to map.*
Under **Cognos** » **Deltek** » **CER Consumer**	**CAP** » **Deltek Group** » **CER Consumer**
Under **Cognos** » **Deltek** » **CER Contracts**	**CAP** » **Deltek Group** » **CER Contracts**
Under **Cognos** » **Deltek** » **CER Developer**	**CAP** » **Deltek Group** » **CER Developer**
Under **Cognos** » **Deltek** » **CER Executive Secure**	**CAP** » **Deltek Group** » **CER Executive Secure**
Under **Cognos** » **Deltek** » **CER Expense Secure**	**CAP** » **Deltek Group** » **CER Expense Secure**
Under **Cognos** » **Deltek** » **CER General Ledger Secure**	**CAP** » **Deltek Group** » **CER General Ledger Secure**
Under **Cognos** » **Deltek** » **CER HR**	**CAP** » **Deltek Group** » **CER HR**
Under **Cognos** » **Deltek** » **CER Manufacturing Secure**	**CAP** » **Deltek Group** » **CER Manufacturing Secure**
Under **Cognos** » **Deltek** » **CER Materials**	**CAP** » **Deltek Group** » **CER Materials**
Under **Cognos** » **Deltek** » **CER Materials Manufacturing All Secure**	**CAP** » **Deltek Group** » **CER Materials Manufacturing All Secure**
Under **Cognos** » **Deltek** » **CER People**	**CAP** » **Deltek Group** » **CER People**
Under **Cognos** » **Deltek** » **CER Planning (Projects)**	**CAP** » **Deltek Group** » **CER Planning (Projects)**
Under **Cognos** » **Deltek** » **CER Planning (Projects) Secure**	**CAP** » **Deltek Group** » **CER Planning (Projects) Secure**
Under **Cognos** » **Deltek** » **CER Procure Secure**	**CAP** » **Deltek Group** » **CER Procure Secure**
Under **Cognos** » **Deltek** » **CER Project Manager Security**	**CAP** » **Deltek Group** » **CER Project Manager Security**
Under **Cognos** » **Deltek** » **CER Projects**	**CAP** » **Deltek Group** » **CER Projects**
Under **Cognos** » **Deltek** » **CER Projects Secure**	**CAP** » **Deltek Group** » **CER Projects Secure**
Under **Cognos** » **Deltek** » **CER Time & Expense**	**CAP** » **Deltek Group** » **CER Time & Expense**

Cognos User Group	Costpoint Cognos User Group(CAP)
Under **Cognos** » **Deltek** » **CER Time Secure**	**CAP** » **Deltek Group** » **CER Time Secure**
Under **Cognos** » **Deltek** » **CER User**	**CAP** » **Deltek Group** » **CER User**

Step 9 - Customize Capability Permissions

Permissions for Cognos capabilities need to be manually added as some adjustments are needed to standard capabilities.

Each of the Costpoint Business Intelligence user roles that were established for license types is mapped to a predefined role in Cognos in order to minimize the setup required here. The predefined role in Cognos is a close match to the capabilities we want for each Costpoint Business Intelligence role but there are some modifications required in order to be in compliance with Deltek licensing.

To add Permissions to Capabilities:

1. In Costpoint BI, click **Manage** » **Administration Console**.
2. On the **IBM Cognos Administration** screen, click the **Security** tab. Click **Capabilities**.
3. Look for the **Capability** for which you want to assign a **Permission**. For example, **Administration**.
4. Click the drop-down beside the **Capability** and then click **Set Properties**.
5. Click the **Permissions** tab.
6. Click **Add...** and select the role that you want to add to the **Capability**. For example, for the **Administration** capability, select the **CER Web Administrator** role which is found in **Cognos** » **Deltek** » **CER Web Administrator**.
7. Click the yellow arrow icon to transfer the role to the **Selected entries** group box on the right. Click **OK**.
8. On the **Permissions** tab, select the added role (for example, **CER Web Administrator**), and select the permissions check box under the **Grant** column.

   In our example, **CER Web Administrator**, select **Execute** and **Traverse** under the **Grant** column.

   > **Note:** Make sure that the **Override the access permissions acquired from the parent entry** check box is selected.

9. Click **OK**.
10. Repeat steps 3 to 9 for the other capabilities in the following table.

Capability	Role
Administration	Add **CER Web Administrator**. Grant **Execute** and **Traverse** for both roles.
AI	Add **CER User** and **CER Advanced Lite**. Grant **Execute** and **Traverse** for both roles.
Analysis Studio	Add **CER Advanced Lite** and grant **Execute** and **Traverse** permissions.
Cognos Insight	Remove **Everyone**.

Capability	Role
Cognos Viewer	Add **CER Consumer** and **CER Advanced Lite**. Grant **Execute** and **Traverse** permissions.
Collaborate	Add **CER Advanced Lite** and grant **Execute** and **Traverse** permissions.
Dashboard	Add **CER User** and **CER Advanced Lite**. Grant **Execute** and **Traverse** permissions to both roles.
Data sets	Add **CER Advanced User** and **CER Developer**. Grant **Execute** and **Traverse** permissions to both roles.
Detailed Errors	Add **CER User**, **CER Advanced Lite**, **CER Advanced User**, and **CER Developer**. Grant **Execute** and **Traverse** permissions to all these roles.
Execute Indexed Search	Add **CER Consumer** and **CER Advanced Lite**. Grant **Execute** and **Traverse** permissions to these roles.
Executive Dashboard	Add **CER Advanced Lite**. Grant **Execute** and **Traverse** permissions to these roles.
Exploration *Only Explorers get this capability out of the box.*	Add **CER Consumer** and **CER User** and grant **Traverse** to both of these roles. Add **CER Advanced Lite** and **CER Advanced User**. Grant **Execute** and **Traverse** permissions to these roles.
External Repositories	Add **CER Web Administrator** and grant **Execute** and **Traverse** to these roles.
Import Relational Metadata	Add **CER Web Administrator** and grant **Execute** and **Traverse**.
Manage Content	Add **CER Web Administrator**. Grant **Execute** and **Traverse** permissions.
Manage Own Data Source Signons	Add **CER Web Administrator** and grant **Execute** and **Traverse**.
Query Studio	Add **CER Advanced Lite** and grant **Execute** and **Traverse**.
Report Studio	Add **CER Consumer**,**CER User** and grant **Traverse** to both these roles. Add **CER Advanced Lite** and grant **Execute** and **Traverse** to these roles.

Capability	Role
Save to Cloud	Add **CER Web Administrator**. Grant **Execute** and **Traverse**.
Scheduling (and Subscriptions)	Add **CER Consumer**, **CER User**, and **CER Advanced Lite**. Grant **Execute** and **Traverse** to all of these roles.
Upload Files	Add **CER Advanced User**, **CER Developer**, and **CER Web Administrator**. Grant **Execute** and **Traverse** to all of these roles. Remove **Everyone**.
Watch Rules	Add **CER Advanced Lite** and grant **Execute** and **Traverse**.
Web-based Modeling	Add **CER Advanced User** and **CER Developer**. Grant **Execute** and **Traverse**. Remove **Everyone**.

Step 10 - Customize Secured Feature Permissions

Capabilities that are underlined indicate that there are secured features within a capability that needs to be modified to be in compliance with Deltek licensing. For example, you need to modify **Administration**, to add user roles such as the **CER Web Administrator** and secure permissions for the **Administration Tasks** feature. Click on the underlined Capability to drill into its secured feature and customize the permissions. If you do not have the license for the indicated user role in this procedure, just skip and move on to the next user role that is available.

To customize permissions for a secured feature:

1. In Costpoint BI, click **Manage** » **Administration Console**.
2. On the **IBM Cognos Administration** screen, click the **Security** tab. Click **Capabilities**.
3. Look for the **Capability** for which you want to assign a **Permission** to its secured feature and click it. For example, **Administration**.
4. Click the drop-down beside the secured feature (for example, **Administration** » **Administration tasks**) and then click **Set Properties**.
5. Click the **Permissions** tab.
6. Click **Add...** and select the role that you want to add to the secured feature. For example, for **Administration** » **Administration tasks** secured feature, select the **CER Web Administrator** role which is found in **Cognos** » **Deltek** » **CER Web Administrator**.
7. Click the yellow arrow icon to transfer the role to the **Selected entries** group box on the right. Click**OK**.
8. On the **Permissions** tab, select the added role (for example, **CER Web Administrator**), and select the permissions check box under the **Grant** column.

   In our example, **CER Web Adminstrator**, select **Execute** and **Traverse** under the **Grant** column.
9. Click **OK**.
10. Repeat steps 3 to 9 for the other capabilities in the following table.

Secured Feature	Role
AdministrationAdministration ▪ **Collaboration Administration** ▪ **Configure and Manage the System** ▪ **Data Source Connections** ▪ **Distribution Lists and Contacts**	Add **CER Web Administrator**. Grant **Execute** and **Traverse**.

Secured Feature	Role
- **Manage Visualizations** - **Mobile Administration** - **Printers** - **Query Service Administration** - **Run Activities and Schedules** - **Set capabilities and manage UI profiles** - **Styles and portlets** - **Users, Groups, and Roles**	
AI - **Use Assistant**	Add **CER User** and **CER Advanced Lite**. Grant **Execute** and **Traverse** to all these roles. Remove **Everyone**.
Analysis Studio	Add **CER Advanced Lite**, **CER Advanced User**, **CER Developer**. Grant **Execute** and **Traverse** to all these roles.
Cognos Insight	Remove **Everyone**.
Cognos Viewer - **Context Menu** - **Run With Options** - **Selection** - **Toolbar**	Add **CER Consumer** and **CER Advanced Lite**. Grant **Execute** and **Traverse** to these roles.
Collaborate - **Allow collaboration features** - **Launch collaboration tools**	Add **CER Advanced Lite** and grant **Execute** and **Traverse** .
Dashboard - **Create/Edit**	Add **CER User**, **CER Advanced Lite**, **CER Advanced User**, and **CER Developer**. Grant **Execute** and **Traverse** to these roles.
Executive Dashboard	Add **CER Advanced Lite** and grant **Execute** and **Traverse**.

Secured Feature	Role
▪ **Use Advanced Dashboard Features** ▪ **Use Interactive Dashboard Features**	
External Repositories ▪ **Manage repository connections**	Add **CER Web Administrator**. Grant **Execute** and **Traverse**.
Query Studio ▪ **Advanced** ▪ **Create**	Add **CER Advanced Lite** and grant **Execute** and **Traverse**.
Report Studio ▪ **Allow External Data**	Add **CER Consumer** and **CER User**. Grant **Traverse** to both of these roles. Add **CER Advanced Lite**, **CER Advanced**, and **CER Developer**. Grant **Execute** and **Traverse** to these roles.
Report Studio ▪ **Create/Delete**	Add **CER Advanced Lite** and grant **Execute** and **Traverse** to these roles.
Report Studio ▪ **HTML Items in Report** ▪ **User Defined SQL**	Add **CER Consumer**, **CER User**, and **CER Advanced Lite**. Grant **Execute** to these roles. Add **CER Advanced User** and **CER Developer**. Grant **Execute** and **Traverse** to these roles.
Save to Cloud ▪ **Manage Connections**	Add **CER Web Administrator** and grant **Execute** and **Traverse**.
Scheduling (and Subscriptions) ▪ **Schedule by Day**	Add **CER Consumer**, **CER User**, **CER Advanced Lite**, **CER Advanced User**, and **CER Developer**. Grant **Execute** and **Traverse** to all of these roles.
Scheduling (and Subscriptions) ▪ **Schedule by Hour** ▪ **Schedule by Minute** ▪ **Schedule by Month** ▪ **Schedule by Trigger**	Add **CER Advanced Lite** and grant **Execute** and **Traverse** .

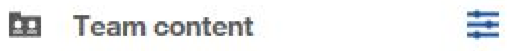
Secured Feature	Role
▪ **Schedule by Week** ▪ **Schedule by Year**	

Step 11 - Add Everyone and Assign Read Access to the Team Content Folder

The Everyone user needs to have Read access to the Team Content folder.

To add Everyone and assign access to the Team Content folder:

1. In Cognos Analytics, click **Team Content** folder. Click the **Properties** icon beside it.



2. Click **Permissions**.
3. If there is a user displayed, remove it by clicking the minus sign adjacent to it. All users must be removed.
4. Click the **Plus** (⊕) icon to open the screen for selecting groups, users, or roles.
5. On the **Select groups, users or roles** screen, go to **Cognos** » **Deltek** » **Everyone**. Click **Add**.
   Everyone will be added to the list of roles on the **Permissions** area for the tenant folder.
6. On the **Permissions** area, select the drop-down for **Permissions** for **Everyone** and select **Read**.
7. Click **Apply**.
8. Refresh browser.

Step 12 - Validate User Groups

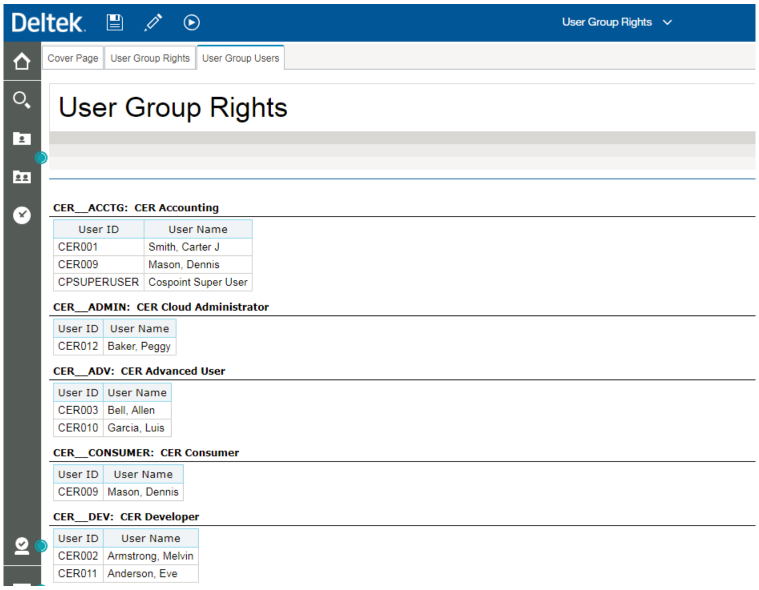
After you complete the steps in the post-installation phase, check the list of users per user group in Costpoint Business Intelligence against your accomplished Security Planning Template.

To perform this procedure, you must have access to the **User Group Rights** report in **Team Content** » **Costpoint Enterprise Reporting for Costpoint Administration** » **Security**.

> **Note:** If you do not have access to the **User Group Rights** report, you can also use the **Print User Group Rights Report** (SYRGRPR) in Costpoint which is located in **Admin** » **Security** » **Security Reports/Inquiries** » **Print User Group Rights Report**.

To validate the users in user groups:

1. In Costpoint Business Intelligence 8.0, go to **Team Content** » **Costpoint Enterprise Reporting for Costpoint Administration** » **Security** and run the **User Group Rights** report.
2. On the prompt screen, enter **CER__** in the **User Group(s):** field. Click **Search**.
3. Select all the user groups that start with **CER__** that you have created and click **Insert** to transfer them to the selection box on the right.
4. Click **Run Report**.
5. On the report, click the **User Group Users** tab.
6. Compare the list of users in the report to the list of users that are in your Security Planning Template. Check if all users are accounted for.



User Group Rights

CER__ACCTG: CER Accounting

User ID	User Name
CER001	Smith, Carter J
CER009	Mason, Dennis
CPSUPERUSER	Cospoint Super User

CER__ADMIN: CER Cloud Administrator

User ID	User Name
CER012	Baker, Peggy

CER__ADV: CER Advanced User

User ID	User Name
CER003	Bell, Allen
CER010	Garcia, Luis

CER__CONSUMER: CER Consumer

User ID	User Name
CER009	Mason, Dennis

CER__DEV: CER Developer

User ID	User Name
CER002	Armstrong, Melvin
CER011	Anderson, Eve

Step 13 - Add the Deltek Theme to Cognos Analytics

Deltek provides a theme as part of your Costpoint Business Intelligence installation.

To apply the Deltek theme to your Cognos Analytics portal:

1. On the pane on the left-hand side of the Welcome portal, click **Manage** and select **Customization**.
2. On the Customization screen, select **Deltek** and click **Apply**.

> **Caution:** For on-premise users who use CAP, you may receive a message to refresh your browser to apply the theme. However, Deltek recommends that you log out of Costpoint and log back in to properly apply the theme. Otherwise, you may receive an error when you refresh your browser. If an error still occurs, log in as an active directory user when you apply the Deltek theme. This may solve the issue.

Optional Task

This concludes all of the post-installation configuration tasks that must be completed prior to first-use.

However, there is another task that you can do to improve the display in the MO Pick List report for Project Manufacturing users. You can install the bar code font used in the said report.

Configure the Barcode Font for MO Pick List Report

In order to display the barcodes on the MO Pick List report, you need to copy the barcode font to the Cognos Server and the desktops that you use to view the report.

> **Note:** The Costpoint Business Intelligence installation includes a copy of the barcode font file, **FRE3OF9X.ttf**, in the font folder of the installation directory (for example, C:\Program Files (x86)\Deltek\CostpointBusinessIntelligence\CER800\Support\font).

You will also need to map the physical font in Cognos Configuration.

To set up the barcode font:

1. On your Cognos server, copy the barcode font to the C:\Windows\fonts folder.

   > **Note:** You also need to copy the barcode font to the C:\Windows\fonts folder for all the computers that you use for viewing the MO Pick List report. If you do not install the barcode font on a computer, you can still view the barcode when you generate a PDF copy of the MO Pick List Report.

2. Open IBM Cognos Configuration.
3. Click **Action** » **Edit Global Configuration...** » **Fonts** tab.
4. Click **Add...**, enter **FRE3OF9X** in the **Supported Font Name** field, and click **OK**.
5. In the **Explorer** pane, click **Environment** to display the Environment - Group Properties on the right pane.
6. Under the **Font Settings**, click the **Edit** button in the **Physical fonts map** field
7. On the Value - Physical fonts map dialog box, click **Add...** , enter **FRE3OF9X** in the **Global Font Name** field, and click the **Edit** button in the **Physical Font Name** field.
8. On the Physical Font Name dialog box, click **Search Now**, select **Free 3 of 9 Extended** from the list of fonts, and click **OK**.
9. Click **OK** to save the physical fonts map.
10. Restart the Cognos service.

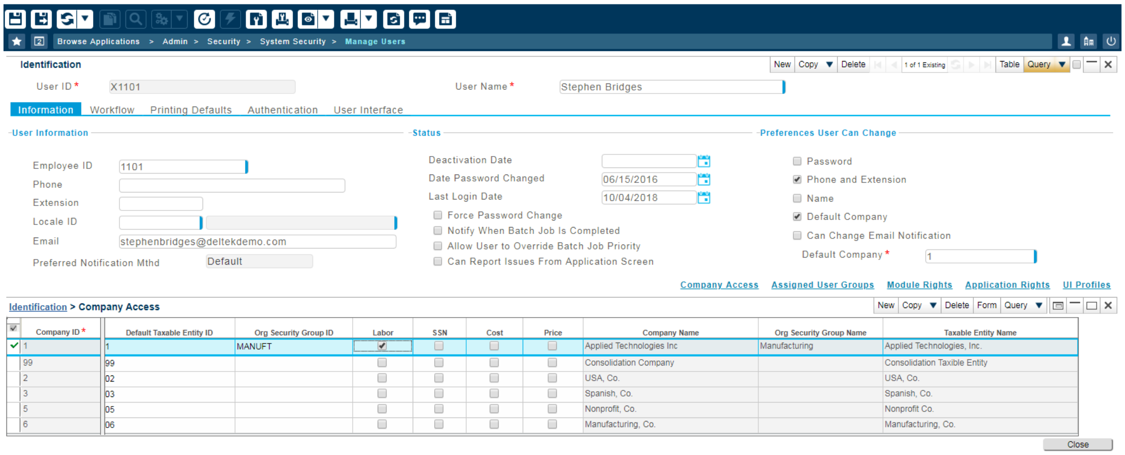
Special Topic 1: Organization, Labor Suppression, and Project Security in Costpoint

The project model in Costpoint Business Intelligence leverages the Organization Security settings in Costpoint. If model security is turned on, a user MUST be assigned an Org Security Group or they will not see any data. If you do not want org restrictions on the user, you would assign them to an "All Orgs" security group that has access to all organizations.

Once a user is set up and assigned an Org Security Group ID, they will have access to all the projects that are linked to that organization. An Org Security Group ID is linked to an Org Security Profile by module. For Costpoint Business Intelligence to determine the security to apply, it looks for the profile associated with a specific module. The following table shows the corresponding model security profile for each secured package.

Secured Package	Module Security Profile Used	Organization Secured
Accounts Receivable	AR	Owning Org
General Ledger	GL	Performing Org
Project Reporting	PJ	Owning Org
Project Analysis	PJ	Owning Org
Accounts Payable	AP	Performing Org
Procurement	PO	Organization may vary
Materials	IN	Organization may vary
Manufacturing	PC	Organization may vary
Time	N/A	Organization may vary

In addition, the Project model will suppress labor if the Labor flag is checked for the user. It is important that at least one Org is assigned to the Org Security Group. If no orgs are assigned, the user will not be able to see any data.



Identification

User ID * X1101

User Name * Stephen Bridges

User Information

Employee ID 1101

Phone

Extension

Locale ID

Email stephenbridges@deltekdemo.com

Preferred Notification Mthd Default

Status

Deactivation Date

Date Password Changed 06/15/2016

Last Login Date 10/04/2018

□ Force Password Change

□ Notify When Batch Job Is Completed

□ Allow User to Override Batch Job Priority

□ Can Report Issues From Application Screen

Preferences User Can Change

□ Password

☑ Phone and Extension

□ Name

☑ Default Company

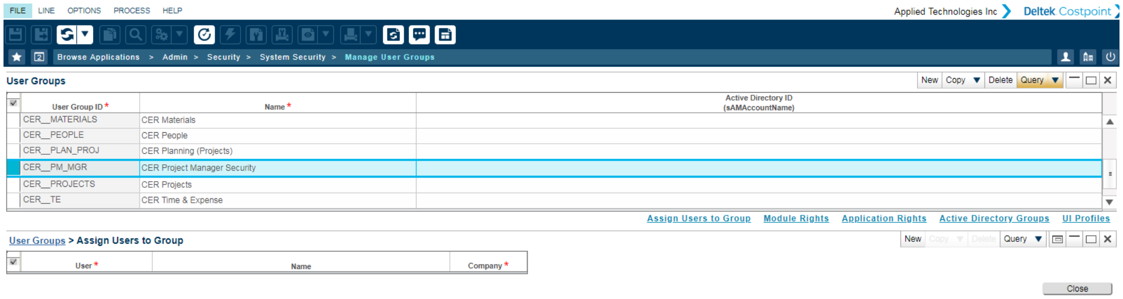
□ Can Change Email Notification

Default Company * 1

Identification > **Company Access**

☑	Company ID *	Default Taxable Entity ID	Org Security Group ID	Labor	SSN	Cost	Price	Company Name	Org Security Group Name	Taxable Entity Name
✓	1	1	MANUFT	☑	□	□	□	Applied Technologies Inc	Manufacturing	Applied Technologies, Inc.
	99	99		□	□	□	□	Consolidation Company		Consolidation Taxible Entity
	2	02		□	□	□	□	USA, Co.		USA, Co.
	3	03		□	□	□	□	Spanish, Co.		Spanish, Co.
	5	05		□	□	□	□	Nonprofit, Co.		Nonprofit Co.
	6	06		□	□	□	□	Manufacturing, Co.		Manufacturing, Co.

When a user is set up as Project Manager, this organization group they are assigned to is irrelevant, since they will only see the projects they are assigned to, regardless of org. In order to limit the projects to only the projects that the Project Manager owns, you must assign the user to the group, CER__PM_MGR. Project Security applies to Accounts Receivable and Projects models.



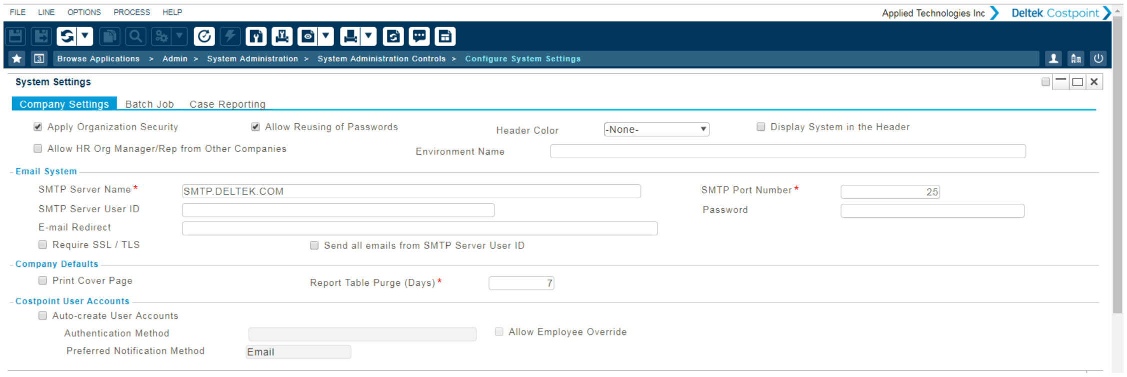
User Groups

☑	User Group ID *	Name *	Active Directory ID (sAMAccountName)
	CER__MATERIALS	CER Materials	
	CER__PEOPLE	CER People	
	CER__PLAN_PROJ	CER Planning (Projects)	
	CER__PM_MGR	CER Project Manager Security	
	CER__PROJECTS	CER Projects	
	CER__TE	CER Time & Expense	

User Groups > **Assign Users to Group**

☑	User *	Name	Company *

Note: It is possible to implement model security in the CER Projects model without applying security in Costpoint. In order to do this, simply clear the **Apply Organization Security** check box under Configure System Settings.


FILE
LINE
OPTIONS
PROCESS
HELP
Applied Technologies Inc
Deltek Costpoint
Browse Applications > Admin > System Administration > System Administration Controls > Configure System Settings
Company Settings
Batch Job
Case Reporting

System Settings

☑ Apply Organization Security

☑ Allow Reusing of Passwords

Header Color -None-

□ Display System in the Header

□ Allow HR Org Manager/Rep from Other Companies

Environment Name

Email System

SMTP Server Name * SMTP.DELTEK.COM

SMTP Port Number * 25

SMTP Server User ID

Password

E-mail Redirect

□ Require SSL / TLS

□ Send all emails from SMTP Server User ID

Company Defaults

□ Print Cover Page

Report Table Purge (Days) * 7

Costpoint User Accounts

□ Auto-create User Accounts

Authentication Method

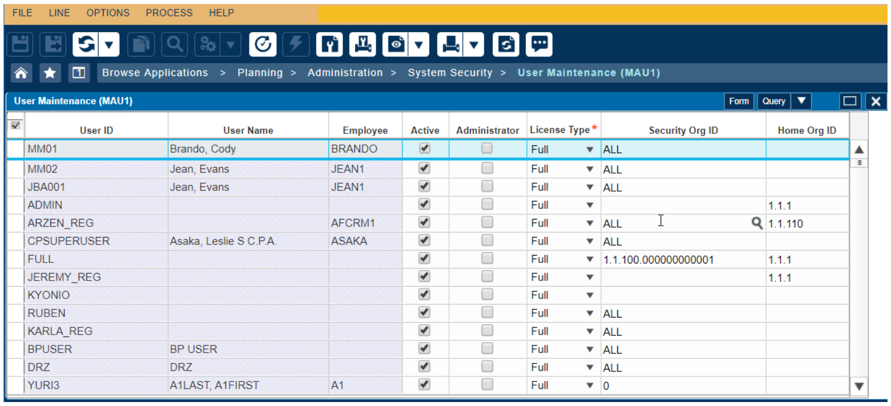
□ Allow Employee Override

Preferred Notification Method Email

Special Topic 2: Organization and Project Security in Costpoint Planning

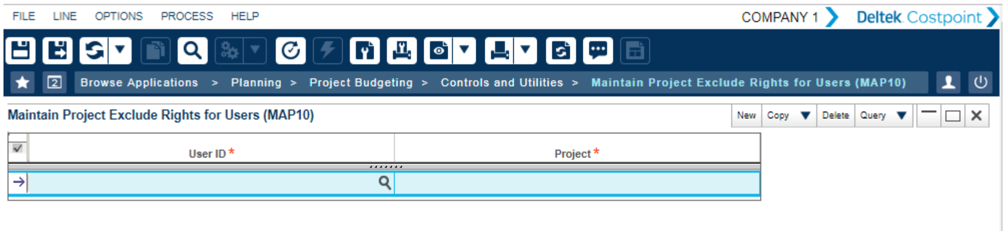
The Project Planning model in Costpoint Business Intelligence leverages the Organization/Project Security settings in the Costpoint Planning module. Costpoint Planning (formerly Budgeting and Planning) has distinct security settings related to the Planning content and does not use the Costpoint Organization Security used in the core Projects CER model.

The CER Project Planning models leverage the Organization Security set up in the User Maintenance application shown below. Once a user is set up and given a Security Org ID, they will have access to all the projects that are owned by that Organization. In addition, if a user is set up as Project Manager for a project that is owned by an organization that they do not have access to, they will be granted access to those projects.

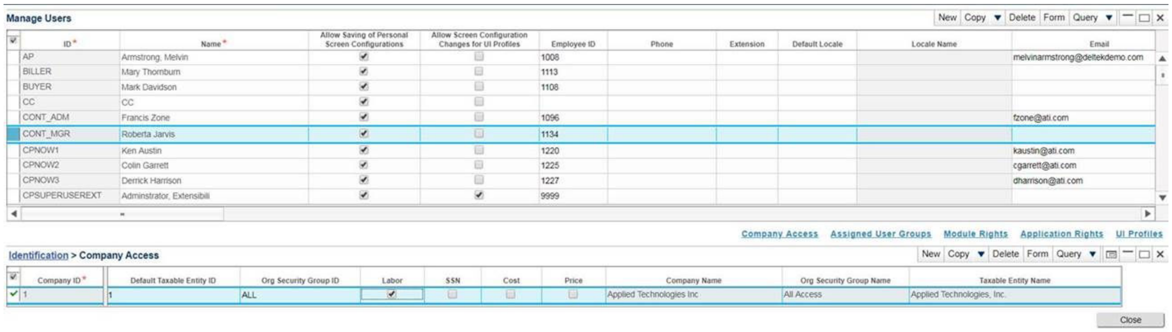

FILE LINE OPTIONS PROCESS HELP
Browse Applications > Planning > Administration > System Security > User Maintenance (MAU1)
User Maintenance (MAU1)
Form
Query

User ID	User Name	Employee	Active	Administrator	License Type*	Security Org ID	Home Org ID
MM01	Brando, Cody	BRANDO	☑	☐	Full	ALL	
MM02	Jean, Evans	JEAN1	☑	☐	Full	ALL	
JBA001	Jean, Evans	JEAN1	☑	☐	Full	ALL	
ADMIN			☑	☐	Full		1.1.1
ARZEN_REG		AFCRM1	☑	☐	Full	ALL	1.1.110
CPSUPERUSER	Asaka, Leslie S C.P.A.	ASAKA	☑	☐	Full	ALL	
FULL			☑	☐	Full	1.1.100.000000000001	1.1.1
JEREMY_REG			☑	☐	Full		1.1.1
KYONIO			☑	☐	Full		
RUBEN			☑	☐	Full	ALL	
KARLA_REG			☑	☐	Full	ALL	
BPUSER	BP USER		☑	☐	Full	ALL	
DRZ	DRZ		☑	☐	Full	ALL	
YURI3	A1LAST, A1FIRST	A1	☑	☐	Full	0	

There is currently no way to limit the projects to only the projects that the PM owns. However, there is a way to exclude specific projects from a user's list using the following screen. Once a user and a project is added here, they will no longer be able to access that project.


FILE LINE OPTIONS PROCESS HELP
COMPANY 1
Deltek Costpoint
Browse Applications > Planning > Project Budgeting > Controls and Utilities > Maintain Project Exclude Rights for Users (MAP10)
Maintain Project Exclude Rights for Users (MAP10)
New
Copy
Delete
Query
User ID*
Project*

Labor suppression settings made in the Manage User application (same application for Costpoint and Planning) are leveraged in Planning and in the CER Project Planning models. (See prior Special Topic 1 on org security in Costpoint for information about labor suppression.)



Manage Users

☑	ID*	Name*	Allow Saving of Personal Screen Configurations	Allow Screen Configuration Changes for UI Profiles	Employee ID	Phone	Extension	Default Locale	Locale Name	Email
	AP	Armstrong, Melvin	☑	□	1008					melvinarmstrong@deltekdemo.com
	BILLER	Mary Thornburn	☑	□	1113					
	BUYER	Mark Davidson	☑	□	1108					
	CC	CC	☑	□						
	CONT_ADM	Francis Zone	☑	□	1096					fzone@ati.com
	CONT_MGR	Roberta Jarvis	☑	□	1134					
	CPNOW1	Ken Austin	☑	□	1220					kaustin@ati.com
	CPNOW2	Colin Garrett	☑	□	1225					cgarrett@ati.com
	CPNOW3	Derrick Harrison	☑	□	1227					dharrison@ati.com
	CPSUPERUSEREXT	Adminstrator, Extensibili	☑	☑	9999					

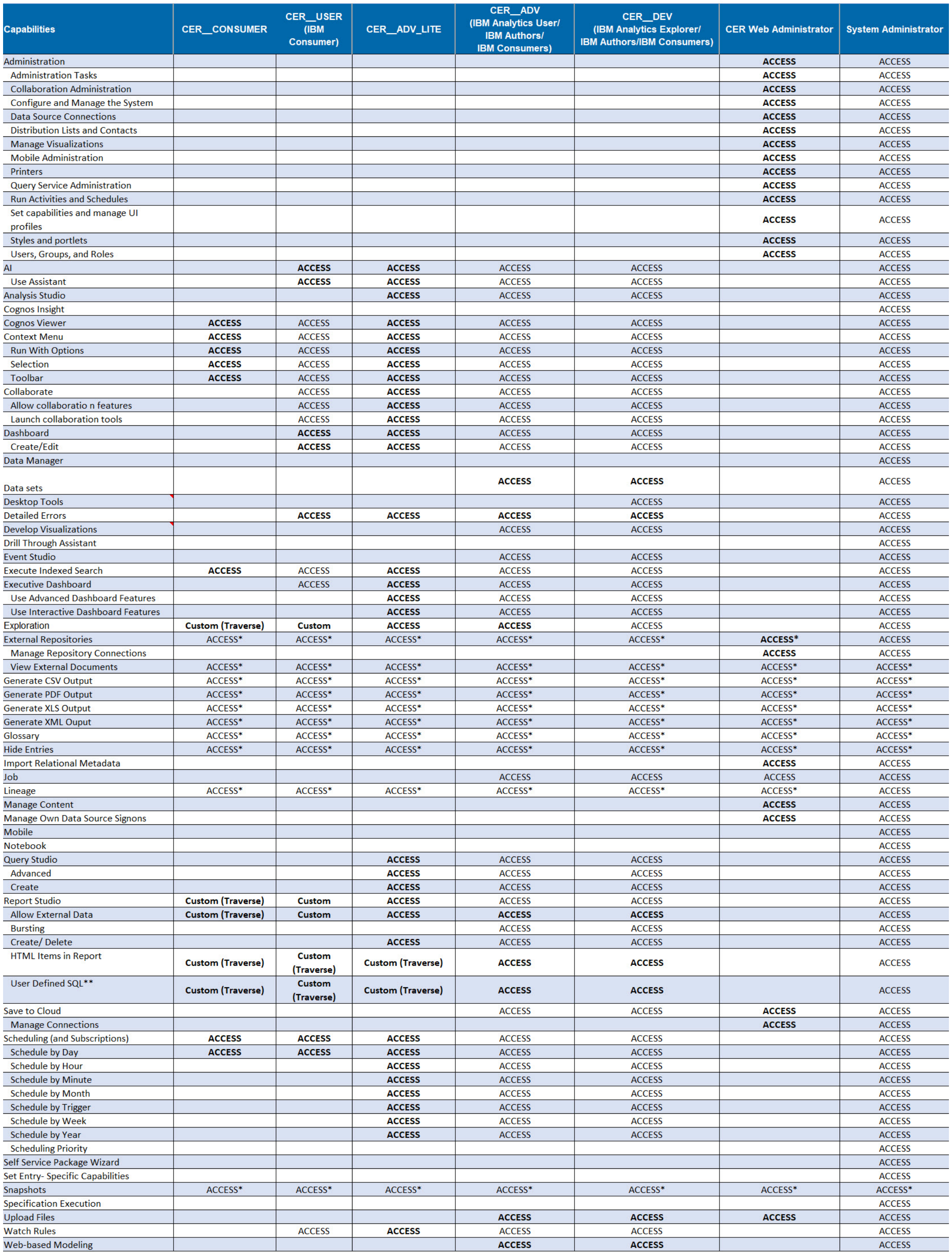
Company Access Assigned User Groups Module Rights Application Rights UI Profiles

Identification > Company Access

☑	Company ID*	Default Taxable Entity ID	Org Security Group ID	Labor	SSN	Cost	Price	Company Name	Org Security Group Name	Taxable Entity Name
✓	1	1	ALL	☑	□	□	□	Applied Technologies Inc	All Access	Applied Technologies, Inc.

Special Topic 3: Detailed Capabilities by Role

User Roles have unique sets of capabilities assigned to them upon installation. You should assign users to roles that are appropriate to their function in the organization.



Capabilities	CER__CONSUMER	CER__USER (IBM Consumer)	CER__ADV_LITE	CER__ADV (IBM Analytics User/ IBM Authors/ IBM Consumers)	CER__DEV (IBM Analytics Explorer/ IBM Authors/IBM Consumers)	CER Web Administrator	System Administrator
Administration						**ACCESS**	ACCESS
Administration Tasks						**ACCESS**	ACCESS
Collaboration Administration						**ACCESS**	ACCESS
Configure and Manage the System						**ACCESS**	ACCESS
Data Source Connections						**ACCESS**	ACCESS
Distribution Lists and Contacts						**ACCESS**	ACCESS
Manage Visualizations						**ACCESS**	ACCESS
Mobile Administration						**ACCESS**	ACCESS
Printers						**ACCESS**	ACCESS
Query Service Administration						**ACCESS**	ACCESS
Run Activities and Schedules						**ACCESS**	ACCESS
Set capabilities and manage UI profiles						**ACCESS**	ACCESS
Styles and portlets						**ACCESS**	ACCESS
Users, Groups, and Roles						**ACCESS**	ACCESS
AI		**ACCESS**	**ACCESS**	ACCESS	ACCESS		ACCESS
Use Assistant		**ACCESS**	**ACCESS**	ACCESS	ACCESS		ACCESS
Analysis Studio			**ACCESS**	ACCESS	ACCESS		ACCESS
Cognos Insight							ACCESS
Cognos Viewer	**ACCESS**	ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Context Menu	**ACCESS**	ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Run With Options	**ACCESS**	ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Selection	**ACCESS**	ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Toolbar	**ACCESS**	ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Collaborate		ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Allow collaboratio n features		ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Launch collaboration tools		ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Dashboard		**ACCESS**	**ACCESS**	ACCESS	ACCESS		ACCESS
Create/Edit		**ACCESS**	**ACCESS**	ACCESS	ACCESS		ACCESS
Data Manager							ACCESS
Data sets				**ACCESS**	**ACCESS**		ACCESS
Desktop Tools					ACCESS		ACCESS
Detailed Errors		**ACCESS**	**ACCESS**	**ACCESS**	**ACCESS**		ACCESS
Develop Visualizations				ACCESS	ACCESS		ACCESS
Drill Through Assistant							ACCESS
Event Studio				ACCESS	ACCESS		ACCESS
Execute Indexed Search	**ACCESS**	ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Executive Dashboard		ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Use Advanced Dashboard Features			**ACCESS**	ACCESS	ACCESS		ACCESS
Use Interactive Dashboard Features			**ACCESS**	ACCESS	ACCESS		ACCESS
Exploration	**Custom (Traverse)**	**Custom**	**ACCESS**	**ACCESS**	ACCESS		ACCESS
External Repositories	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	**ACCESS***	ACCESS
Manage Repository Connections						**ACCESS**	ACCESS
View External Documents	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Generate CSV Output	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Generate PDF Output	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Generate XLS Output	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Generate XML Ouput	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Glossary	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Hide Entries	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Import Relational Metadata						**ACCESS**	ACCESS
Job				ACCESS	ACCESS	ACCESS	ACCESS
Lineage	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS
Manage Content						**ACCESS**	ACCESS
Manage Own Data Source Signons						**ACCESS**	ACCESS
Mobile							ACCESS
Notebook							ACCESS
Query Studio			**ACCESS**	ACCESS	ACCESS		ACCESS
Advanced			**ACCESS**	ACCESS	ACCESS		ACCESS
Create			**ACCESS**	ACCESS	ACCESS		ACCESS
Report Studio	**Custom (Traverse)**	**Custom**	**ACCESS**	ACCESS	ACCESS		ACCESS
Allow External Data	**Custom (Traverse)**	**Custom**	**ACCESS**	**ACCESS**	**ACCESS**		ACCESS
Bursting				ACCESS	ACCESS		ACCESS
Create/ Delete			**ACCESS**	ACCESS	ACCESS		ACCESS
HTML Items in Report	**Custom (Traverse)**	**Custom (Traverse)**	**Custom (Traverse)**	**ACCESS**	**ACCESS**		ACCESS
User Defined SQL**	**Custom (Traverse)**	**Custom (Traverse)**	**Custom (Traverse)**	**ACCESS**	**ACCESS**		ACCESS
Save to Cloud				ACCESS	ACCESS	**ACCESS**	ACCESS
Manage Connections						**ACCESS**	ACCESS
Scheduling (and Subscriptions)	**ACCESS**	**ACCESS**	**ACCESS**	ACCESS	ACCESS		ACCESS
Schedule by Day	**ACCESS**	**ACCESS**	**ACCESS**	ACCESS	ACCESS		ACCESS
Schedule by Hour			**ACCESS**	ACCESS	ACCESS		ACCESS
Schedule by Minute			**ACCESS**	ACCESS	ACCESS		ACCESS
Schedule by Month			**ACCESS**	ACCESS	ACCESS		ACCESS
Schedule by Trigger			**ACCESS**	ACCESS	ACCESS		ACCESS
Schedule by Week			**ACCESS**	ACCESS	ACCESS		ACCESS
Schedule by Year			**ACCESS**	ACCESS	ACCESS		ACCESS
Scheduling Priority							ACCESS
Self Service Package Wizard							ACCESS
Set Entry- Specific Capabilities							ACCESS
Snapshots	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*	ACCESS*
Specification Execution							ACCESS
Upload Files				**ACCESS**	**ACCESS**	**ACCESS**	ACCESS
Watch Rules		ACCESS	**ACCESS**	ACCESS	ACCESS		ACCESS
Web-based Modeling				**ACCESS**	**ACCESS**		ACCESS

*Everyone has this capability so this is automatically applied to new roles.

**User Defined SQL is turned off for the following packages. This prevents unauthorized users to bypass security through SQL.

- Projects
- Planning
- General Ledger
- Accounts Receivable
- Accounts Payable
- Procurement
- Materials
- Manufacturing
- Time

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.
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