Deltek

Deltek Costpoint® Planning 8.0

Post-Upgrade Configuration Guide

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Contents

About This Guide

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.

Welcome to the Costpoint Planning 8.0 Post-Upgrade Configuration Guide.

This guide is for customers who have upgraded from Costpoint Planning 7.0 to 8.0 and is intended for System Administrators.

The procedures described in this guide should be completed after the upgrade installation is completed but before users access the software.

If you have a new Costpoint Planning installation, see the "Deltek Costpoint Planning 8.0: Post-Installation Configuration Guide."

Prerequisites

Before you can complete the procedures described in this guide, Costpoint Planning must be installed on Costpoint version 7.1.1 or later. However, you can read data from a Costpoint version 7.0.1 database using an external connection setup in WebLogic.

Process Overview

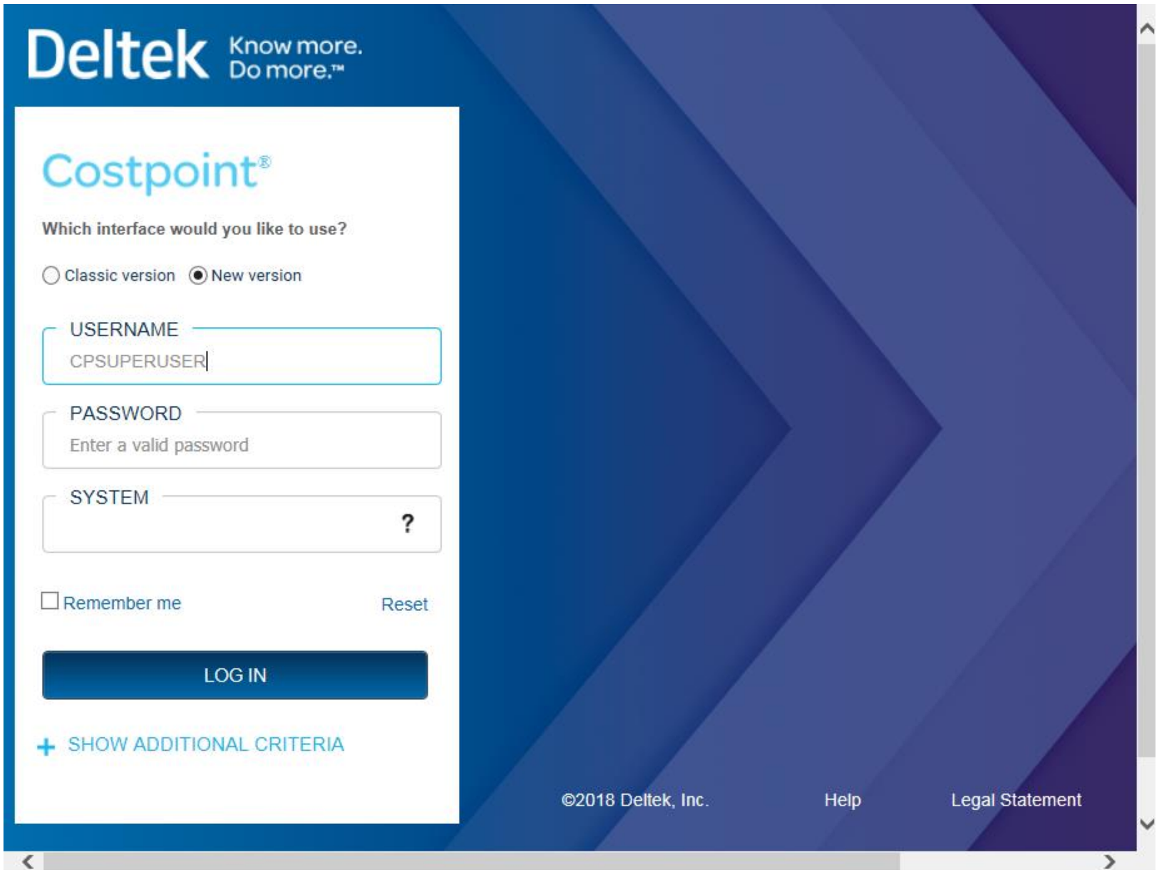
The following list provides a brief overview of the tasks required to complete the post-upgrade configuration of Costpoint Planning:

- **Step 1: Activate Administration Rights.**
- **Step 2: Set Up the Refresh Process** — Set up scheduled jobs, entailing the following:
  a. Create Job Parameters
  b. Create a Job ID
  c. Create a Job Queue
  d. Create a Job Server
  e. Add Job to the Queue
  f. Assign Queue to Job Server
- **Step 3: Run a Manual Refresh**
- **Step 4: Migrate Users to Costpoint**
- **Step 5: Assign Users to Costpoint Planning User Groups** — Set up groups of applications which will be accessible to users.
- **Step 6: Enable User Security and Licensing Options** — Set licensing and security options specific to Costpoint Planning for each user.
- **Step 7: Validate Data** — Compare report data in Costpoint Planning with Costpoint to confirm results.

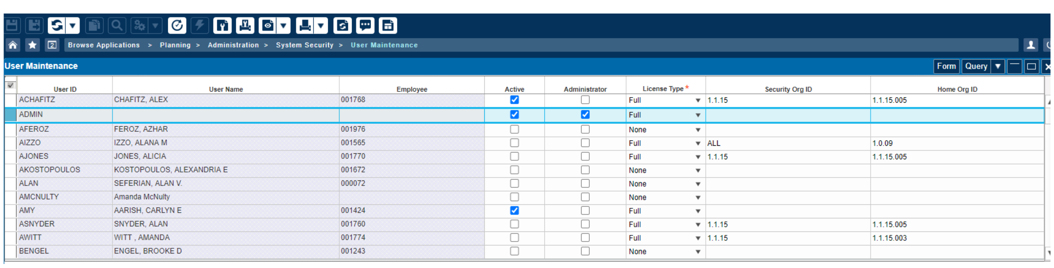
Step 1: Activate Administration Rights

To activate your Costpoint Administration rights:

1. Log on to Costpoint as CPSUPERUSER.



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



Step 2: Set Up the Refresh Process

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

The purpose of the refresh process is to bring in all of the new data from Costpoint and Time & Expense, such as the following:

- Open Purchase Orders
- New accounts, orgs, projects
- New employees, vendors
- Actual costs posted to the general ledger
- Timesheets created in Time Collection
- Expenses created in Expense

The Costpoint Planning refresh process is generally run on a nightly basis, via the Job Server.

Setting up the refresh process requires six separate procedures performed in sequence, outlined as follows:

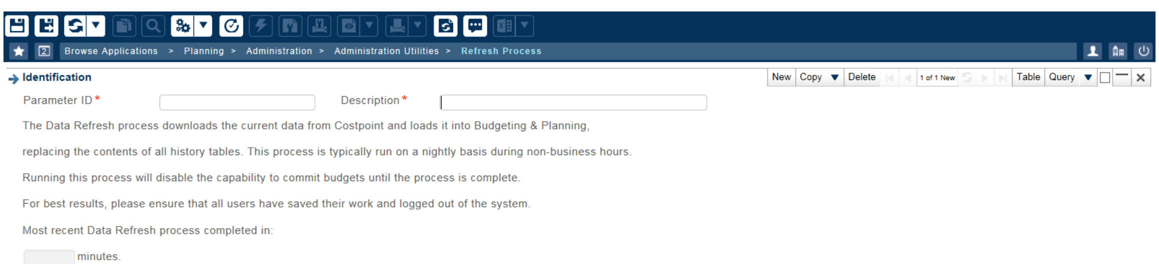
1. Create refresh job parameters.
2. Create job.
3. Create a job queue.
4. Create a job server.
5. Add job to queue.
6. Assign queue to job server.

Detailed steps for each of these procedures is provided in order below.

Create Refresh Job Parameters

To create a job parameter:

1. Click **Planning » Administration » Administration Utilities » Refresh Process**.



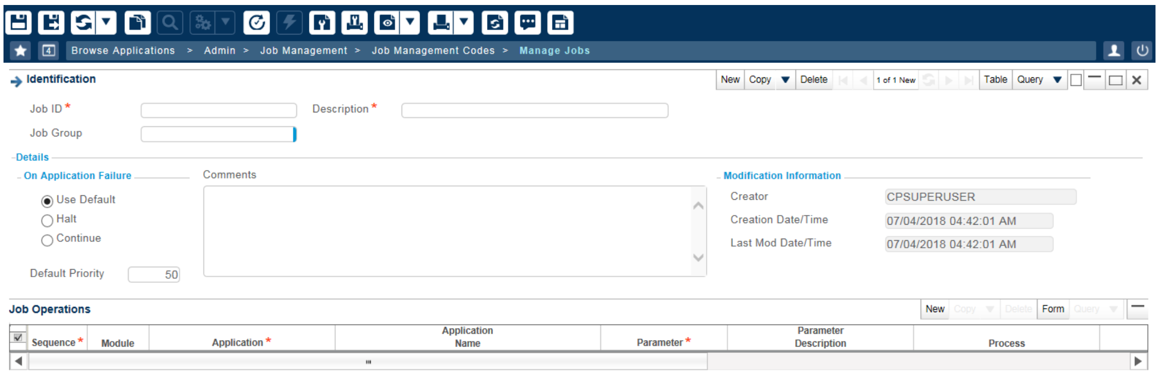
2. On the Refresh Process screen, set the **Parameter ID** to **REFRESH**.
3. Set the **Description** to **Refresh Process**.
4. Click **Save & Continue**.
5. Exit the **Refresh Process** application.

Create a Job ID

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

To create a job ID:

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



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

Field	Field Value
Job ID	Enter **BNPREFRESH**.
Description	Enter **B&P REFRESH PROCESS**.
On Application Failure	Select **Use Default**.
Default Priority	Enter **1**
Job Operations	In the table, complete the following fields: ▪ **Sequence** — Enter **1**. ▪ **Module** — Enter **BA**. ▪ **Application** — Enter **BNP_BAPREFRESH** or click to select it. ▪ **Parameter** — Enter **REFRESH** or click to select it from Lookup. ▪ **Process** — Enter **BNP_BAPREFRESH_IMPORT** or click to select it.

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

Create a Job Queue

To create a job queue:

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

Create a Job Server

To create a job server:

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

Field	Field Value
Sever Name	Enter **BNPSERVER**.
Destination Server	Select **Default Server or Cluster** from the drop-down list.

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

Add Job to the Queue

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

To submit a job to the queue:

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

Field	Field Value
Job	Enter **BNPREFRESH in the popup Query**.
Queue	Enter **BNP** or click to select it.
Execution Option	Select **Start Time/Date** from the drop-down list.
Start Date	Click and select tomorrow's date.

Field	Field Value
Start Time	Set time to 0200.
Recurrence Frequency	Enter **1**.
Recurring Time Frame	Select **Days** from the drop-down list.

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

Assign Queue to Job Server

To assign a job to the queue:

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

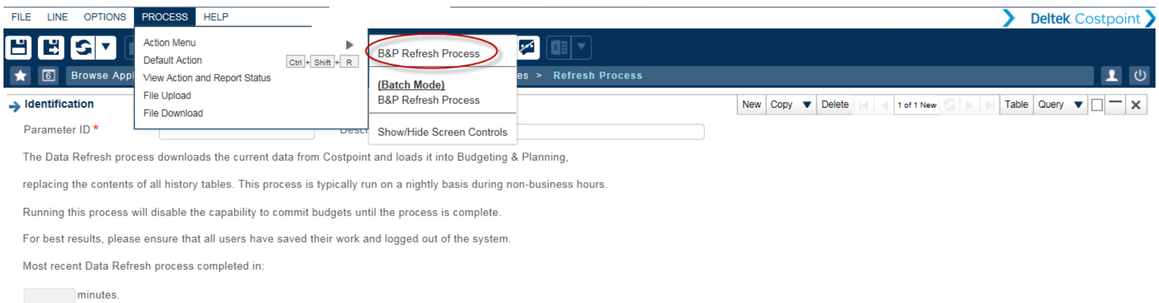
Field	Field Value
Job Queue	Enter **BNP**.
Active for Server	This field should be checked.

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

◻ Step 3: Run a Manual Refresh

To run a manual refresh:

1. Click **Planning » Administration » Administration Utilities » Refresh Process**.
2. On the Process menu, click **Action Menu » B&P Refresh Process** to run the refresh in attended mode.



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

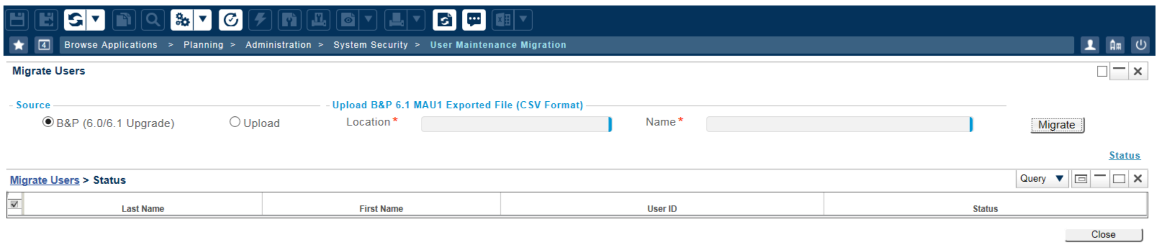
Step 4: Migrate Users to Costpoint

In this step, you will use the User Maintenance Migration utility to import existing Costpoint Planning 6.1 users into Costpoint.

The migration utility also transfers the Costpoint Planning tables to the Costpoint tables by uploading existing tables or through csv format.

To migrate users to Costpoint:

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



2. On the User Maintenance Migration screen, complete the following fields:

Field	Field Value
Source	Select whether the source of user tables is from B&P 6.0/6.1 upgrade or from a new upload.
Upload B&P 6.1 MAU1 Exported File (CSV Format)	Enter the Location and Name of the excel file.

3. Click **Migrate.**

The Status table displays the user's Last Name, First Name, User ID and Status of the migration.

Users that have been created have a randomly generated password created and sent to their email address (if one existed in Budgeting & Planning 6.1).

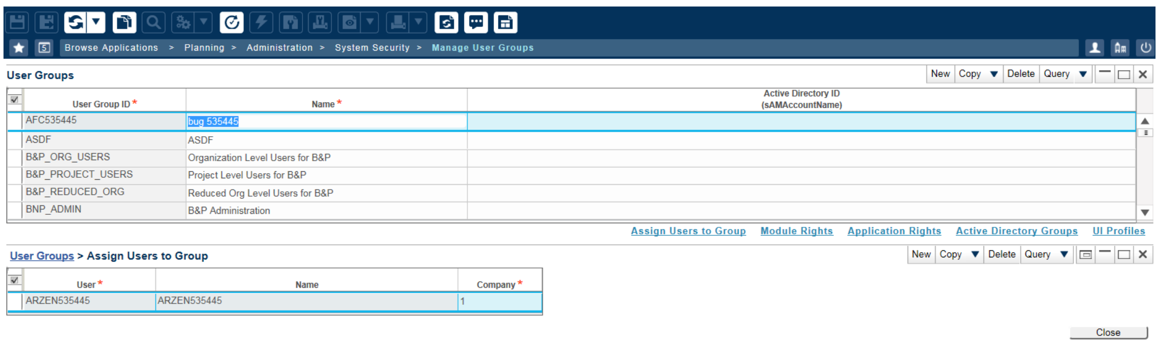
Step 5: Assign Users to User Groups

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

Note that Costpoint Planning 8.0 leverages the Costpoint security model, and as such, it replaces the Security Groups functionality. As a result, new User Groups will need to be created and assigned in 8.0.0 to re-establish the functionality from Security Groups in version 7.0.

To set up users in Costpoint:

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



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

2. Click **New** in the User Group table to create a User Group. Further establish security and access rights for that group using the following subtasks:

   - **Assign User to Group —** Use this subtask to assign users to a user group.
   - **Module Rights —** Use this subtask to assign Read-Only, Full, or Deny rights in one or more Costpoint modules to a user group by company.
   - **Application Rights —** Use the fields in this subtask table window to assign Read-Only, Full, or Deny rights to a user in one or more Costpoint applications within a module.
   - **Active Directory Groups —** Use this subtask to load Active Directory (AD) groups to Costpoint from a pre-generated CSV file.
   - **UI Profiles —** Use this subtask to view a list of user interface (UI) profiles.

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

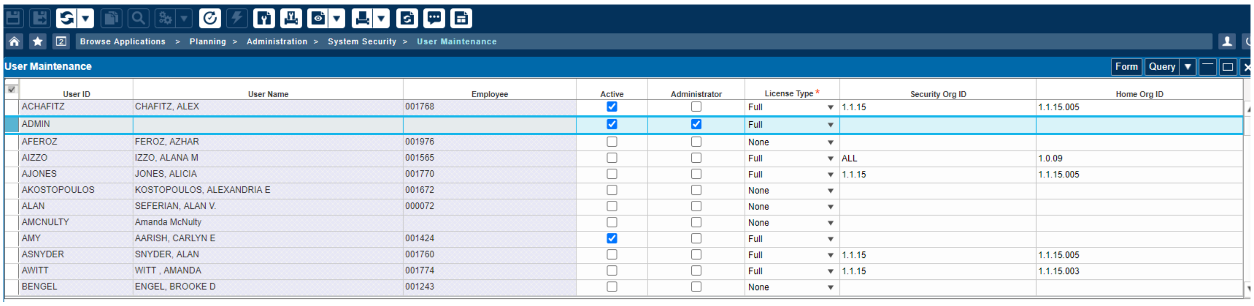
3. Click .

☐ Step 6: Enable User Security and Licensing Options

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

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

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



User ID	User Name	Employee	Active	Administrator	License Type *	Security Org ID	Home Org ID
ACHAFITZ	CHAFITZ, ALEX	001768	☑	☐	Full	1.1.15	1.1.15.005
ADMIN			☑	☑	Full		
AFEROZ	FEROZ, AZHAR	001976	☐	☐	None		
AIZZO	IZZO, ALANA M	001565	☐	☐	Full	ALL	1.0.09
AJONES	JONES, ALICIA	001770	☐	☐	Full	1.1.15	1.1.15.005
AKOSTOPOULOS	KOSTOPOULOS, ALEXANDRIA E	001672	☐	☐	None		
ALAN	SEFERIAN, ALAN V.	000072	☐	☐	None		
AMCNULTY	Amanda McNulty		☐	☐	None		
AMY	AARISH, CARLYN E	001424	☑	☐	Full		
ASNYDER	SNYDER, ALAN	001760	☐	☐	Full	1.1.15	1.1.15.005
AWITT	WITT , AMANDA	001774	☐	☐	Full	1.1.15	1.1.15.003
BENGEL	ENGEL, BROOKE D	001243	☐	☐	None		

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

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

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

<table>
<tr><th>Field</th><th>Field Value</th></tr>
<tr><td>Active</td><td>Select this check box to indicate that the employee is active and should be counted against an active license. Clear the check box if the employee is no longer active and you want to free that license seat.

Unless you are using the Cloud version of Costpoint Planning, if Active is selected, the number of currently active users is compared to the number allowed by your licensing, when you save the record.

For non-Cloud customers, a warning message displays for the user when the license is within thirty days of its expiration date, or when the license has expired and the user attempts to logon.</td></tr>
<tr><td>License Type</td><td>Use this drop-down list to assign an available license type to a user. Choose from the following:
None - Select this option if the user does not have rights.
Full - This license provides access to all modules within the Planning Domain</td></tr>
</table>

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

3. Click .

Step 7: Validate Data

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

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

Costpoint Reports	Costpoint Planning Reports	Notes
Financial Statement **Accounting » General Ledger » General Ledger Reports/Inquiries » Print Financial Statements**	Profit and Loss by Account **Planning » Organization Budgeting » Profit and Loss Reports » Profit and Loss by Account**	In Costpoint Planning, select **Cost** (actuals) under Report Type.
CP Statement of Indirect Expenses **Projects » Cost and Revenue Processing » Cost Pool Processing » Compute/Print Pool Rates**	Rate Analysis by Org report **Planning » Organization Budgeting » Rate Processing/Reports » Rate Analysis by Org**	In Costpoint Planning, select **Cost** (actuals) under Report Type, and **Pools** under Pool Type. Run the report for each pool and compare the results to the same pools in Costpoint. To view the Statement of Indirect Expenses report in Costpoint without processing Cost Pools, do the following: 1. Complete parameters on the Compute/Print Pool Rates screen. 2. Click  on the toolbar.
Project Status **Projects » Project Inquiry and Reporting » Project Reports/Inquiries» Print Project Status Report**	Project Status report **Planning » Project Budgeting » Supplemental Reports » Project Status**	Use same parameters in both Costpoint and Costpoint Planning.

Appendix A: Review New Configuration Settings

When you upgrade from version 7.0, all of your existing configuration settings are automatically imported. However, there are new configuration settings in version 8.0, which did not exist in 7.0.

All of the Costpoint Planning configuration settings are located on the **Planning » Administration » Administration Controls » Configuration Settings** screen. Only System Administrators can update these settings.

However, decisions regarding how to set each option will require advance input from key personnel within your company, such as Accounting and Project groups, and possibly outside consultants as well.

The note below includes a hyperlink to the "Costpoint Planning 8.0 Post-Upgrade Configuration Worksheet." This document includes the following:

- A key section that provides additional, critical background on the new **Org Budget Revenue Calculation** setting.

  This setting affects *all* Organization Budgets. Decisions regarding this setting must be carefully considered, because switching methods later would be an involved process, which may require Customer Care assistance.

- Descriptions and notes for all new configuration settings.
- A Decision column where final choices for each setting can be noted for your future use.

> **Note:** Costpoint Planning 8.0 Post-Upgrade Configuration Settings Worksheet.
>
> Click the above link to download the document and personally distribute to Accounting personnel and other decision-makers, or right-click the link and select **Copy Link Location** to distribute the link itself.

Downloading Deltek Products using Deltek Software Manager

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 aren't already logged in.

Appendix B: If You Need Assistance

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

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 delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com