

Deltek

# Costpoint Essentials 8.2.15

Costpoint Essentials  
Security Guide

October 1, 2024

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## About This Guide

Welcome to the Costpoint Essentials 8.2.15 Security Guide.

Use this guide after you receive administrative rights to Costpoint Essentials. This guide will walk you through the initial setup, so your environment is secured before you allow users to navigate applications, run and create reports and dashboards, and leverage the built-in security features. This is intended as a 'quick start' guide and does not describe all the available security options.

## Prerequisites

Before you can complete the procedures described in this guide, you should have received Costpoint access from Deltek as a system administrator. Basic employees and user setup should have already been established in Costpoint.

## Overview

In this setup guide, you will learn how to set up users' security in Costpoint Essentials so they have access only to the applications and reports needed to perform their jobs.

### User Groups

When you use Costpoint Essentials for the first time, a pre-established set of user groups are available for use.

These user groups determine the Costpoint modules, applications, and reports (in Costpoint and Business Intelligence) a user will have access to.

Deltek recommends that you identify which users can be assigned into these categories based on their job functions.

Description	Entry/End User	Admin
<b>Core Modules</b>		
Accounting	STD_ACCT_ENTRY	STD_ACCT_ADMIN
Planning	STD_PLAN_PROJECTS	STD_PLAN_ADMIN
Projects	STD_PROJ_ENTRY	STD_PROJ_ADMIN
Billing	STD_BILL_ENTRY	STD_PROJ_ADMIN
Labor, Employee	STD_LABOR_ENTRY	STD_PEOPLE_ADMIN
Time	STD_TIME_ENTRY	STD_TIME_ADMIN
Expense	STD_EXPENSE_ENTRY	STD_EXPENSE_ADMIN
Executive Role*	STD_EXEC_ROLE	N/A
Project Role*	STD_PROJ_ROLE	N/A
Resource Mgmt Role*	STD_RESRCE_MGMT_ROLE	N/A
Administrator	N/A	STD_ALL
<b>BI Capabilities</b>		
Consumer	STD_BI_CONSUMER	N/A
Author	STD_BI_BASIC_AUTHOR	N/A
Admin	N/A	STD_BI_ADMIN
<b>Add-On Modules</b>		
CRM & Contracts	STD_CNTR_ENTRY	STD_CNTR_ADMIN
Payroll, Employee	SDT_PAYROLL_ENTRY	STD_PEOPLE_ADMIN
Procurement	STD_PROC_ENTRY	STD_MFG_ADMIN

Description	Entry/End User	Admin
Manufacturing	STD_MFG_ENTRY	STD_MFG_ADMIN
Materials	STD_SELL_ENTRY	STD_MFG_ADMIN

Most user groups are categorized as either Entry or Admin. Entry users will have access to all screens related to a particular domain or module and Admin users will have access to those same screens with the addition of control screens. For example, STD\_ACCT\_ENTRY will have access to screens in the Accounts Payable, Accounts Receivable and General Ledger modules within the Accounting domain. STD\_ACCT\_Admin will have access to the same accounting screens as STD\_ACCT\_ENTRY with the addition of accounting control screens such as Configure General Ledger Settings (GLMSETNG) that are reserved for accounting administrators.

\*Users assigned to STD\_EXEC\_ROLE, STD\_RESRCE\_MGMT\_ROLE and STD\_PROJ\_ROLE do not get access to Costpoint entry or admin screens. They get access only to BI reports that apply to their role. In addition, users assigned to STD\_PROJECT\_ROLE are automatically restricted to projects where they are assigned as the Project Manager on the Manage Project User Flow screen. Learn more about [Project Role Security](#).

A BI Capability user group determines what a user can do within Business Intelligence (BI). A BI user must be assigned to one and only one capability group to gain access to BI. The matrix below describes each BI capability group's function(s)

**Costpoint BI Capabilities**

Function	STD_BI_CONSUMER BI Capability - Consumer	STD_BI_BASIC_AUTHOR BI Capability - Basic Author	STD_BI_ADMIN BI Capability - Admin
Viewing Reports and Dashboards and Subscribing to Reports	•	•	•
Authoring Dashboards		•	•
Authoring Reports		•	•
Data Module			•
Data Sets			•
Excel Upload			•
Create Custom SQL			•
Administration Console			•

# Set Up Costpoint Essential Users

## Establish Yourself as the BI Administrator

The BI Administrator role will give you access to the appropriate Reporting & Analytics menu items for BI, all the BI standard reports and dashboards, and provide you the capabilities for managing BI.

To establish yourself as the BI administrator:

1. In Costpoint, select **Admin » Security » System Security » Manage Users**.
2. On the Manage Users screen, enter your name in the **User Name** field.
3. Click the Assign User Groups subtask. And click **New**.
4. In the **User Group** field, enter, or click  to select, **STD\_BI\_ADMIN** and enter your company.
5. Click **New** and repeat Step 4, adding **STD\_ALL** in the **User Group** field.
6. On the Company Access subtask, click **New** and enter your company ID. Click the **Suppress Labor** and/or **Suppress SSN** checkbox as needed and click **Save**.

## Fill Out the Security Template

The Security Template has three areas that will guide you when you set up users in Costpoint.

First, use the [Security Template](#) to list down all the Costpoint users in your organization. And then, plot their assignments based on the following:

- **User Groups:** This area holds the different user groups. For example, **STD\_ACCT\_ENTRY** or the **Accounting Data Entry** user group.
- **BI Capabilities:** This category includes the different Business Intelligence or BI capabilities that you can assign to BI users. You must assign at least one capability to a BI user for them to use BI data. For example, **STD\_BI\_BASIC\_AUTHOR (BI Capability - Basic Author)**.
- **Labor Suppression:** If labor suppression is enabled for a user, it will prevent the user from being able to determine the labor rate for an individual employee.
- **SSN Suppression:** When SSN is enabled, the Social Security Number (SSN) value, will be masked for a user in screens and reports. For example, the SSN will be displayed as xxx-xx-xxxx,

After you fill out the Security Template, keep it as reference for the succeeding setup steps.

## Add Users on the Manage Users Screen

With the Security Template as reference, add Costpoint Essential users through the Manage Users (SYMUSR) screen.

### To add users:

1. In Costpoint, select **Admin » Security » System Security » Manage Users**.
2. On the Manage Users screen, enter the name of the first user in the **User Name** field or click **Query** to bring the first user.
3. Open the Assign User Groups subtask. Add lines for each **User Group** from your template. And click **Save**.
4. On the Company Access subtask, select the **Suppress Labor** or **Suppress SSN** checkbox as needed and click **Save**.
5. Repeat steps 2 to 4 to add the rest of the Costpoint Essential users.

## Validate User Groups

After you complete the steps in setting up users, check the list of users per user group in Costpoint Business Intelligence against your accomplished Security Template.

### To validate users in user groups:

1. In Costpoint, select **Admin » Security » Security Reports/Inquiries » Print User Group Rights Report**.
2. On the prompt screen, ensure that **Show Users** is selected.
3. Click the **Preview User Group Rights Report** or **Print User Group Rights Report** icon.
4. Make sure the members of each group match your security template.

# Appendix

## Project Roles Security

Project Roles Security allows you to set up functional roles that are not only limited to a Project Manager. Functional roles can be assigned to users in Costpoint which can then secure the corresponding project data in BI when you assign the user to the STD\_PROJ\_ROLE user group.

**Note:** Project Role Security is applied only to reports in Business Intelligence (BI) and not to the rest of the Costpoint applications and reports.

## Enable Additional Roles for Project Roles Security

Project Role security for the Project Manager role is enabled out of the box.

To enable project role security for other roles:

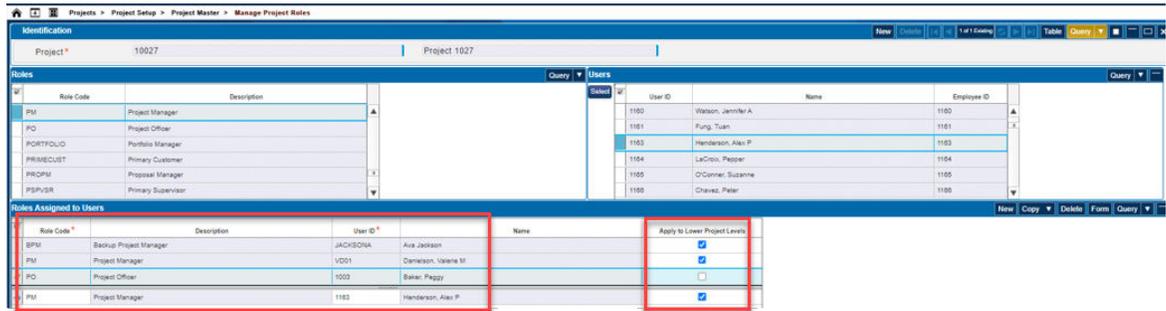
1. In Costpoint, select **Admin » System Administration » System Administration Controls » Manage Functional Roles**.
2. On the Manage Functional Roles screen, add the functional roles, select the corresponding **BI** checkbox and click **Save**.

Manage Functional Roles							
<input type="checkbox"/>	Role Code *	Description *	T&E	BI	CRM & Contracts	Subcontractor Management	Source
<input checked="" type="checkbox"/>	BPM	Backup Project Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	User
<input type="checkbox"/>	PM	Project Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System
<input checked="" type="checkbox"/>	PO	Project Officer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System

3. In Costpoint, select **Projects » Project Setup » Project Master » Manage Project User Flow**.
4. Click the **Project Roles** subtask.

The screenshot shows the 'Project User Flow' configuration interface. At the top, the 'Project' field is set to '10027' and the 'Name' field is 'Project 1027'. Below this, there are tabs for 'Basic Info' and 'Details'. The 'Basic Info' tab is active, showing 'Classification' options like 'Project Classification' (set to 'DIRECT Project'), 'Project Type' (set to 'T&M'), and 'Export Project' (checked). There are also checkboxes for 'Billable Project' and 'Apply Cost of Money Rates'. On the right side, there are 'Charging' options, including 'Active' (checked), 'Allow Charging', and 'Account Group' (set to 'N/A'). At the bottom of the screen, a navigation bar contains several subtasks, with 'Project Roles' highlighted by a red rectangular box.

5. Add roles to the project and click **Save**.



**Note:** Multiple users can be assigned to the same roles. Users who are assigned to the top level will automatically see all levels below. You can also assign users to lower levels.

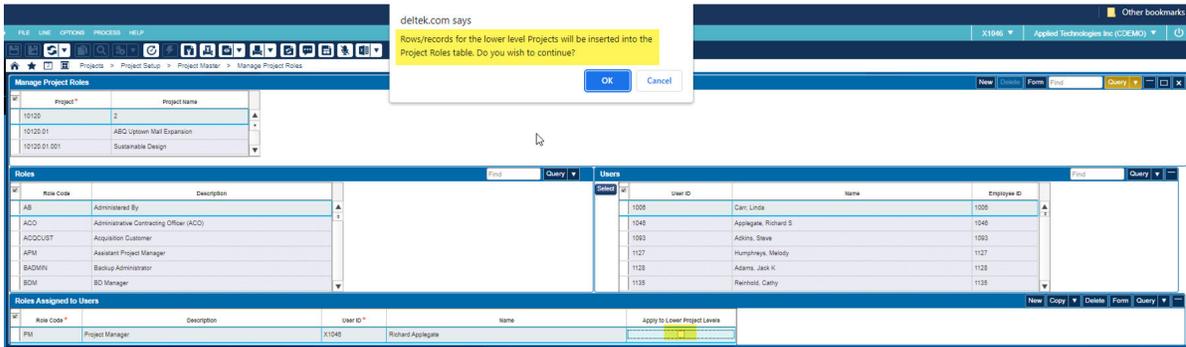
## Viewing Project Data in Multiple Project Levels

If the necessary configurations are set, any project role, including project managers, can view project data at their level and in the lower project levels.

For example, Richard Applegate is the Project Manager for **Project 10120**.

Project ID	Project Name	Project ID Name	Project Long Name	Project ID Long Name	Organization ID	Organization Name	Employee ID	Project Manager	Customer ID	Customer Name	Company ID	Company Name
10120	2	10120-2	Construction and Design	10120-2-Construction and Design	01.01.02	Construction Management	5046	Applegate, Richard S	100008	SHD Engineering, Inc.	1	Applied Technologies Inc
10120-01.001	Sustainable Design	10120-01.001 - Sustainable Design	Sustainable Design	10120-01.001 - Sustainable Design	01.01.02	Construction Management	5046	Applegate, Richard S	100008	SHD Engineering, Inc.	1	Applied Technologies Inc
10120-01.002	Engineering	10120-01.002 - Engineering	Engineering	10120-01.002 - Engineering	01.01.02	Construction Management	5046	Applegate, Richard S	100008	SHD Engineering, Inc.	1	Applied Technologies Inc
10140	DMN Network Review	10140-DMN Network Review	DMN Network Review	10140-DMN Network Review	01.01.01	High Tech	5046	Applegate, Richard S	100017	Opt of Homeland Sec	1	Applied Technologies Inc
10140-01	Scope and Review	10140-01 - Scope and Review	Scope and Review	10140-01 - Scope and Review	01.01.01	High Tech	5046	Applegate, Richard S	100017	Opt of Homeland Sec	1	Applied Technologies Inc
10140-01.001	DMN Network Phase I	10140-01.001 - DMN Network Phase I	DMN Network Phase I	10140-01.001 - DMN Network Phase I	01.01.01	High Tech	5046	Applegate, Richard S	100017	Opt of Homeland Sec	1	Applied Technologies Inc
10140-01.002	DMN Network Phase II	10140-01.002 - DMN Network Phase II	DMN Network Phase II	10140-01.002 - DMN Network Phase II	01.01.01	High Tech	5046	Applegate, Richard S	100017	Opt of Homeland Sec	1	Applied Technologies Inc
10140-02	Network Design	10140-02 - Network Design	Network Design	10140-02 - Network Design	01.01.01	High Tech	5046	Applegate, Richard S	100017	Opt of Homeland Sec	1	Applied Technologies Inc
10140-02.001	Design T.O. #9489752	10140-02.001 - Design T.O. #9489752	Design T.O. #9489752	10140-02.001 - Design T.O. #9489752	01.01.01	High Tech	5046	Applegate, Richard S	100017	Opt of Homeland Sec	1	Applied Technologies Inc
10180	IT Development Plan	10180-IT Development Plan	IT Development Plan	10180-IT Development Plan	01.01.01	High Tech	5046	Applegate, Richard S	100018	Booz Allen	1	Applied Technologies Inc
10180-IT	IT Security Compliance	10180-IT - IT Security Compliance	IT Security Compliance	10180-IT - IT Security Compliance	01.01.01	High Tech	5046	Applegate, Richard S	100018	Booz Allen	1	Applied Technologies Inc
10180-RE	Records Management	10180-RE - Records Management	Records Management	10180-RE - Records Management	01.01.01	High Tech	5046	Applegate, Richard S	100018	Booz Allen	1	Applied Technologies Inc
10170	IT Staff Augmentation	10170-IT Staff Augmentation	IT Staff Augmentation	10170-IT Staff Augmentation	01.01.01	High Tech	5046	Applegate, Richard S	100006	Armstrong Labs	1	Applied Technologies Inc

Richard also oversees the projects in the lower levels and needs to view the corresponding project data. To do this, his project role setting needs to be configured to have this type of access. On the Manager Project Roles screen in Costpoint (**Projects » Project Setup » Project Master**), make a query for **Project 10120** and modify Richard's assigned user role to also access the lower levels of his project through the **Apply to Lower Level Projects** checkbox.



After you apply the configurations and log out and back in to Costpoint BI, the report now shows project data for all lower-level projects for Richard.

Project ID	Project Name	Project ID Name	Project Long Name	Project ID Long Name	Organization ID	Organization Name	Employee ID	Project Manager Name	Customer ID	Customer Name	Company ID
10120	2	10120 - 2	Construction and Design	10120 - Construction and Design	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BND Engineering, Inc.	1
10120.01	ABQ Uptown Mall Expansion	10120.01 - ABQ Uptown Mall Expansion	ABQ Uptown Mall Expansion	10120.01 - ABQ Uptown Mall Expansion	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BND Engineering, Inc.	1
10120.01.001	Sustainable Design	10120.01.001 - Sustainable Design	Sustainable Design	10120.01.001 - Sustainable Design	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BND Engineering, Inc.	1
10120.01.002	Engineering	10120.01.002 - Engineering	Engineering	10120.01.002 - Engineering	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BND Engineering, Inc.	1
10120.03	Portland Wastewater Sys	10120.03 - Portland Wastewater Sys	Portland Wastewater Sys	10120.03 - Portland Wastewater Sys	01.01.02	Construction Management	1014	Arnold, Deborah	100008	BND Engineering, Inc.	1
10120.03.001	Planning	10120.03.001 - Planning	Planning	10120.03.001 - Planning	01.01.02	Construction Management	1014	Arnold, Deborah	100008	BND Engineering, Inc.	1
10120.03.999	System Design	10120.03.999 - System Design	System Design	10120.03.999 - System Design	01.01.02	Construction Management	1014	Arnold, Deborah	100008	BND Engineering, Inc.	1

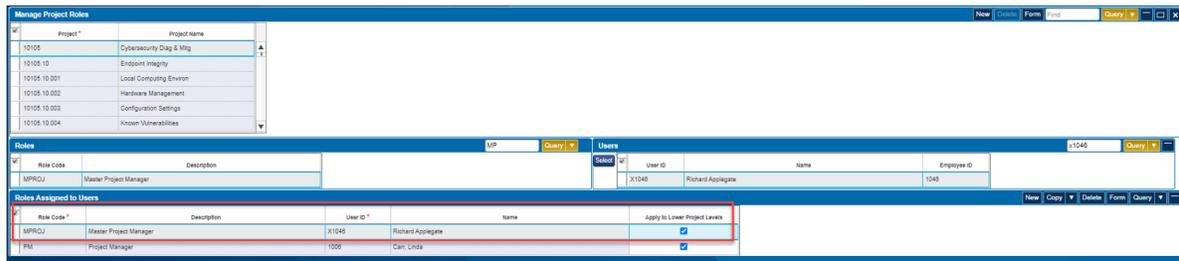
## Viewing Project Data for a Different PM

In some cases, there are Costpoint BI users who oversee multiple projects that have different project managers. Let us assign the Master Project Manager Role for these users.

For example, Richard has a Master Project Manager Role who oversees some projects but does not directly manage them. First, the Master Project Manager Role must be marked as a functional role used in Costpoint BI. Do this on the Manage Functional Roles screen in **Admin » System Administration » System Administration Controls**.

Role Code *	Description *	T&E	BI	CRM & Contracts	Subcontractor Management	Source
EC	End Client	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System
EMPL	Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	System
FA	Funding Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System
FL	Finance Lead	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System
IC	Issuing Client	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System
JVP	Joint Venture Partner	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System
MPROJ	Master Project Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	User
MSUPR	Master Supervisor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	User
OPPO	Opportunity Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	System

And then, add Richard as a Master Project Manager to Project 10105 and apply to lower levels. Do this on the Manage Project Roles screen.



When the report is generated, Richard now sees project data for Project 10105 in addition to his original Project 10120. He sees project data for the organization he belongs and his project role.

Project ID	Project Name	Project ID Name	Project Long Name	Project ID Long Name	Organization ID	Organization Name	Employee ID	Project Manager Name	Customer ID	Customer Name
10105	Cybersecurity Diag & Mitg	10105 - Cybersecurity Diag & Mitg	Cybersecurity Diag & Mitg	10105 - Cybersecurity Diag & Mitg	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10105.10	Endpoint Integrity	10105.10 - Endpoint Integrity	Endpoint Integrity	10105.10 - Endpoint Integrity	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10105.10.001	Local Computing Environ	10105.10.001 - Local Computing Environ	Local Computing Environ	10105.10.001 - Local Computing Environ	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10105.10.002	Hardware Management	10105.10.002 - Hardware Management	Hardware Management	10105.10.002 - Hardware Management	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10105.10.003	Configuration Settings	10105.10.003 - Configuration Settings	Configuration Settings	10105.10.003 - Configuration Settings	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10105.10.004	Known Vulnerabilities	10105.10.004 - Known Vulnerabilities	Known Vulnerabilities	10105.10.004 - Known Vulnerabilities	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10105.30	Boundary Protection	10105.30 - Boundary Protection	Boundary Protection	10105.30 - Boundary Protection	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10105.30.001	Access Control	10105.30.001 - Access Control	Access Control	10105.30.001 - Access Control	01.01.01	High Tech	1041	Boyd, Edward	100017	Dp Ser
10120	2	10120 - 2	Construction and Design	10120 - Construction and Design	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BN Inc
10120.01	ABQ Uptown Mall Expansion	10120.01 - ABQ Uptown Mall Expansion	ABQ Uptown Mall Expansion	10120.01 - ABQ Uptown Mall Expansion	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BN Inc
10120.01.001	Sustainable Design	10120.01.001 - Sustainable Design	Sustainable Design	10120.01.001 - Sustainable Design	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BN Inc
10120.01.002	Engineering	10120.01.002 - Engineering	Engineering	10120.01.002 - Engineering	01.01.02	Construction Management	1046	Applegate, Richard S	100008	BN Inc
10120.03	Portland Wastewater Sys	10120.03 - Portland Wastewater Sys	Portland Wastewater Sys	10120.03 - Portland Wastewater Sys	01.01.02	Construction Management	1014	Arnold, Deborah	100008	BN Inc
10120.03.001	Planning	10120.03.001 - Planning	Planning	10120.03.001 - Planning	01.01.02	Construction Management	1014	Arnold, Deborah	100008	BN Inc
10120.03.999	System Design	10120.03.999 - System Design	System Design	10120.03.999 - System Design	01.01.02	Construction Management	1014	Arnold, Deborah	100008	BN Inc
10140	DHA Network Review	10140 - DHA Network Review	DHA Network Review	10140 - DHA Network Review	01.01.01	High Tech	1046	Applegate, Richard S	100017	Dp Ser
10140.01	Scope and Review	10140.01 - Scope and Review	Scope and Review	10140.01 - Scope and Review	01.01.01	High Tech	1046	Applegate, Richard S	100017	Dp Ser
10140.01.001	DHS Network Phase I	10140.01.001 - DHS Network Phase I	DHS Network Phase I	10140.01.001 - DHS Network Phase I	01.01.01	High Tech	1046	Applegate, Richard S	100017	Dp Ser
10140.01.002	DHS Network Phase II	10140.01.002 - DHS Network Phase II	DHS Network Phase II	10140.01.002 - DHS Network Phase II	01.01.01	High Tech	1046	Applegate, Richard S	100017	Dp Ser
10140.02	Network Design	10140.02 - Network Design	Network Design	10140.02 - Network Design	01.01.01	High Tech	1046	Applegate, Richard S	100017	Dp Ser

## Key Points in Project Roles Security

Here are some pointers to remember when applying Project Roles Security:

- Project Roles Security does not overwrite Organization Security when it is enabled. When model security is turned on, Organization Security is enabled.
- If both Organization Security and Project Roles Security are turned on, then conditions for both types of security need to be met for users to see project data.

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