

Deltek CER Models Overview

This click-thru introduces the Deltek provided framework models in Costpoint Enterprise Reporting.

1. Relational
Style

2. Deltek
Models

3. New
Packages

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Project Status Report

Expense Drill

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Costpoint Enterprise Reporting (CER) includes numerous framework manager models that support dashboards and over a hundred reports. Most of the framework models in CER are designed for relational style reporting.

Company : 10 Applied Technologies Inc

Accounting Period to Date					
Employee Name		Direct Hours	Indirect Hours	Total Hours	DL Util
Home Organization : 10.10.1.1					
Escobar, Mario		128.00	16.00	144.00	88.89%
Henney, Maria		128.00	16.00	144.00	88.89%
Rodgers, Matthew		128.00	16.00	144.00	88.89%
Turner, Amy		76.80	67.20	144.00	53.33%
Wainwright, Laura		128.00	16.00	144.00	88.89%
Walters, Michael		128.00	16.00	144.00	88.89%
	Total :	716.80	147.20	864.00	82.96%
Home Organization : 10.10.1.2					
Carson, Michelle		128.00	16.00	144.00	
Ingram, Duane		128.00	16.00	144.00	
Kelly, Larry		128.00	16.00	144.00	
Slansky, Trevor		128.00	16.00	144.00	
Wilkinson, Marty		128.00	16.00	144.00	
Wright, Ted		128.00	16.00	144.00	
	Total :	768.00	96.00	864.00	

Use Relational style when you create reports that have data as tables and columns and only use query subject and query items.

An example of this is Labor Utilization in **Team Content » Costpoint Enterprise Reporting » Reports » Projects**.

1. Relational Style



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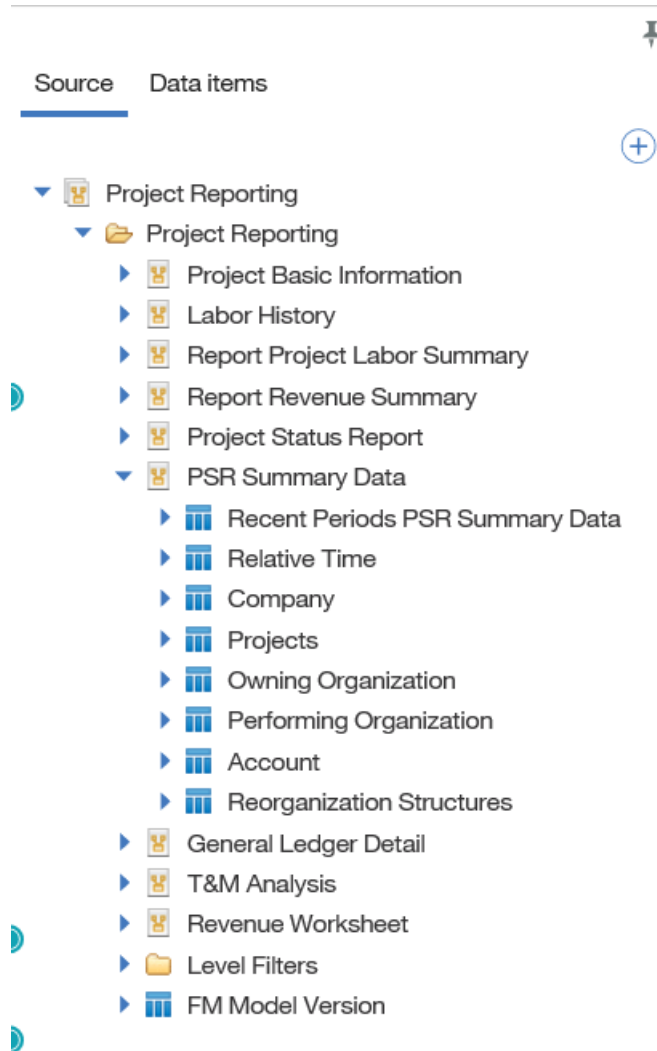
8/15/2019 9:18 AM

The latest Deltek framework models that have been modified or added in CER are:

- Project Reporting
- Planning
- Contracts
- Accounts Receivable
- General Ledger


















































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The **Project Reporting** model has been enhanced where the PSR Summary Data table has been added.





















If you like to use this new model, you can go to **Team Content » *Packages* » Project Reporting**.

- ▼  Project Planning Reporting
 - ▼  Project Status Trend
 - ▶  Project Status Trend
 - ▶  Project (Existing)
 - ▶  Project (Non-Backlog)
 - ▶  Performing Organization
 - ▶  Owning Organization
 - ▶  Owning Organization (Non-Backlog)
 - ▶  Account
 - ▶  Pool Info
 - ▶  Employee
 - ▶  Project Labor Category (PLC)
 - ▶  Vendor
 - ▶  Generic Staff
 - ▶  Filters for Project Status Trend
 - ▶  Advanced Reporting
 - ▶  Project Status Details
 - ▶  General Ledger Detail
 - ▶  A/R Header History
 - ▶  FM Model Version
- ▼  Forecast Budget Amount
 -  Total Forecast Budget Amount
 -  Budget1 Amount
 -  Budget2 Amount
 -  Budget3 Amount
 -  Budget4 Amount
 -  Budget5 Amount
 -  Budget6 Amount
 -  Budget7 Amount
 -  Budget8 Amount
 -  Budget9 Amount
 -  Budget10 Amount
 -  Budget11 Amount
 -  Budget12 Amount
 -  Budget13 Amount
 -  Budget14 Amount
 -  Budget15 Amount
 -  Budget16 Amount
 -  Budget17 Amount
 -  Budget18 Amount
 -  Budget19 Amount
 -  Budget20 Amount
 -  Budget21 Amount
 -  Budget22 Amount
 -  Budget23 Amount
 - Budget24 Amount
 - ▶  Forecast Budget Hours
 - ▶  Forecast Budget Burden Amount

In order to improve performance, the number of columns presented in the eREPORT_PROJ_TREND table has been reduced from 36 to 24. As a result, the limit to trending future periods in reports or dashboards in the Planning models have been reduced to 24.

The Planning models are in:

Team Content » *Packages* » Project Planning Reporting or Team Content » *Packages* » Project Planning Analysis























- ▼  General Ledger
 - ▼  Basic Financial Architecture
 - ▶  Financial Periods
 - ▶  Structures
 - ▼  Financial Reporting
 - ▶  Financial Statements
 - ▶  Transaction Details
 - ▶  Financial Statement Compare
 - ▶  GL Budgets
 - ▼  GL Summary Data
 - ▶  Actuals and Budgets
 - ▶  Financial Statement Lines
 - ▶  Relative Time
 - ▶  Multicurrency
 - ▶  FM Model Version
 - ▶  Performing Org Level Filter
 - ▶  Project Level Filter
 - ▶  Account Level Filter
 - ▶  Performing ReOrg Level Filter
 - ▶  Relative Time Filter

The General Ledger model is now available that helps you create reports and financial statements that leverage the Organization Security and Labor Suppression configuration in Costpoint.

When Organization Security is in place, the reports and dashboards display data that are only within your organization. In this way, your data is more secure.

When Labor Suppression is in place, you can hide the employee names, hours, GLC, and PLC to users. You can set this flag for users in Costpoint.

You can access the General Ledger model in **Team Content » *Packages* » General Ledger**.

- ▼  Accounts Receivable
 - ▼  Customer Information
 - ▶  Customer Information
 - ▶  Customer Terms
 - ▶  Customer Address
 - ▶  Customer Address Contact
 - ▶  Customer Notes
 - ▶  Invoice and Detail History
 - ▼  Multicurrency Unrealized
 - ▶  Unrealized Gain & Loss History
 - ▶  Account
 - ▶  Organization - Performing
 - ▼  AR Summary Data
 - ▶  AR Summary Data
 - ▶  AR Prior 3 Periods (Revenue/Billing)
 - ▶  Projects
 - ▶  FM Model Version
 - ▶  Performing Org Level Filter
 - ▶  Owning Org Level Filter
 - ▶  Owning Reorg Level Filter
 - ▶  Project Level Filter
 - ▶  Account Level Filter

The Accounts Receivable model is a new addition to the CER models in this release.

You can access the Accounts Receivable model in **Team Content » *Packages* » Accounts Receivable**.

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Accounts Receivable
10/11/2019 1:06 AM

Contracts Reporting
7/31/2019 4:55 PM

General Ledger
10/11/2019 1:06 AM

Project Analysis
10/11/2019 1:06 AM

Project Planning Analysis
10/11/2019 1:07 AM

Project Planning Reporting
10/11/2019 1:07 AM

Project Reporting
10/11/2019 1:07 AM

The new packages in CER are located in a separate folder in **Team content » Packages**. Placing the packages in this area creates an efficient way in setting up security permissions.

The new packages are:

- Accounts Receivable
- Contracts Reporting
- General Ledger
- Project Analysis
- Project Planning Analysis
- Project Planning Reporting
- Project Reporting



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A Package is a relational framework model that can be used for more complex reports. It contains the structures of the key project reporting tables in Costpoint. While the structure is based on the Deltek standard Costpoint model, it is streamlined to use those fields most commonly used in report writing.

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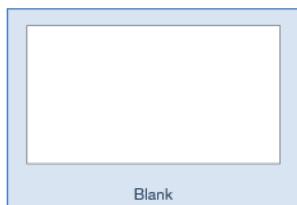
To see an example of a package, open the Project Reporting package. Click **New » Report**.



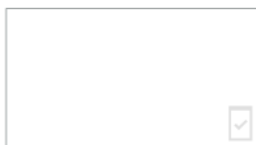
Templates and themes



Templates Themes



Blank



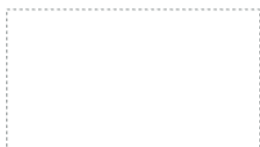
Blank active report



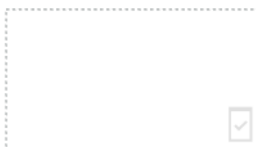
1 beside 2



1 beside 2 active report



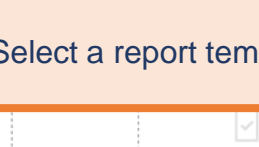
1 column



1 column active report



2 by 2



2 by 2 active report

Select a report template and then click **OK**.

This page uses flow layout. Objects will be arranged top-to-bottom as in a processing document. Drop objects here to add them to this page.

OK

Cancel



Deltak

Click the **Add report data** icon.

Source Data items





Deltek

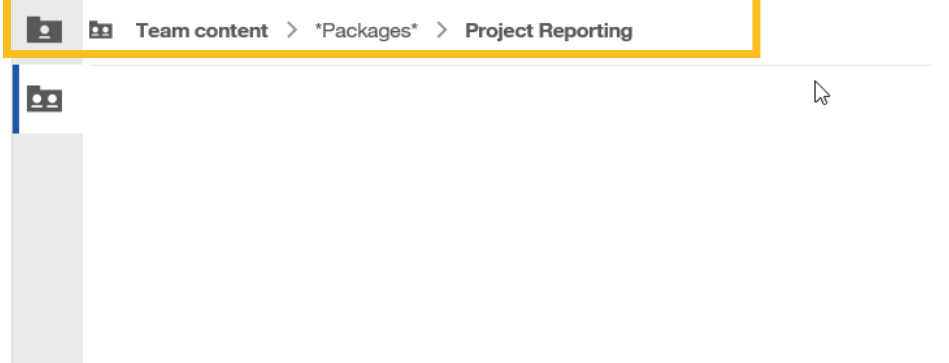


Source Data items



Select **Team content** » ***Packages*** » **Project Reporting**.
Click **Open**.

Open file



Open

Cancel

FM Model Version

⊕

Deltek

Browse Applications > Reports & Analytics > Enterprise Reporting > Enterprise Reporting > Enterprise Reporting

The different parts of this package are designed to make it easy for you to create reports especially those that appear as lists.

These are Namespaces. A namespace is a container which uniquely identifies an object in the model.

This is a namespace.



These are query subjects which are basic building blocks that are sets of query items that have an inherent relationship.

This is a sample folder.

Filters - The filters in this folder are expressions that specify the conditions that rows or instances must meet to be retrieved for the corresponding leveling calculation to which the filter is applied.

Source Data items

- Project Reporting
 - Project Reporting
 - Project Basic Information
 - Labor History
 - Report Project Labor Summary
 - Report Revenue Summary
 - Project Status Report
 - PSR Summary Data
 - Recent Periods PSR Summary Data
 - Relative Time
 - Company
 - Projects
 - Owning Organization
 - Performing Organization
 - Account
 - Reorganization Structures
 - General Ledger Detail
 - T&M Analysis
 - Revenue Worksheet
 - Level Filters
 - Project Level Filter
 - Performing Org Level Filter
 - Ownina Ora Level Filter

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