


Deltek Costpoint® Planning Cloud 8.0

Post-Installation Configuration Guide

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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 7.0 Configuration Guide for cloud customers.

This guide describes initial configuration tasks for new Costpoint Planning installations and is intended for System Administrators. These tasks should be completed after Costpoint Planning 7.0 is fully installed but before users access the software.

Note: If your installation is not new and you upgraded from an earlier version of Costpoint Planning, see “[Deltek Costpoint Planning Cloud 7.0: Post-Upgrade Configuration Guide](#).”

The configurations tasks described in this guide will be implemented by Costpoint Planning System Administrators. However, some of the processes described will require advance input from other groups within your company, such as Accounting and Project groups, and may also require additional advice from outside consultants. Where such cases exist, they are noted.

Prerequisites

Before you can complete the procedures described in this guide, Costpoint Planning must be installed on Costpoint version 7.1.1 or later.

Overview

The following list provides a brief overview of the procedures required to complete the post-installation configuration of Costpoint Planning. Each of these is described in detail within this document:

- **Step 1: Activate Administration Rights** — Ensure that the Planning Administrator has access to all screens and full license rights
- **Step 2: Post Install Setup**
During the post-installation setup, you will do the following:
 - a. Import Initial Data
 - b. Configure Settings
 - c. Import Basic Mapping
 - d. Create Account Mapping
 - e. Finalize Setup
- **Step 3: 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 4: Run a Manual Refresh**
- **Step 5: Add Users to Costpoint**
- **Step 6: Assign Users to Costpoint Planning User Groups**— Set up groups of applications which will be accessible to users.
- **Step 7: Enable User Security and Licensing Options** — Set licensing and security options specific to Costpoint Planning for each user.
- **Step 8: 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 using your Costpoint Username.

2. Create a User Group (for example, BNP_Admin) that has rights to all the screens in Costpoint Planning, and then assign to that user group the Planning Administrator who is performing the post-installation configuration steps.

Note: You will perform this step from **Planning » Administration » System Security » Manage User Groups**. Detailed information about this screen is available from within the online help. After you open the Manage Users Groups screen, click Help on the Costpoint Help menu for more information.

3. Assign license rights to the Planning Administrator:
 - A. Click **Planning » Administration » System Security » User Maintenance**.
 - B. In the row that displays the User ID of the Planning Administrator, select the **Active** check box.
 - C. From the **License Type** drop-down list, select **Full**, if it is not already selected.

User ID	User Name	Employee	Active	License Type	Security Org ID	Home Org ID
ADMIN			<input checked="" type="checkbox"/>	Full	ALL	1.1.1

- D. Click .

□ Step 2: Run the Post-Install Setup Wizard

The Post-Install Setup utility is wizard application where you will import data, basic account mapping, and configure your Costpoint Planning installation.

Wizard Overview

The following is an overview of the type of information that is completed in each wizard screen:

- **Import Initial Data** — This step imports your Costpoint and Time & Expense data into the Costpoint Planning staging tables.
- **Configuration Settings** — This step of the wizard contains six separate tabs for configuring account levels, display, and reporting, as well as Org and Project.

Decisions regarding how to set each option will require advance input from personnel within your company, who will may also require advice from outside consultants.

The note below includes a link to the “Costpoint Planning 8.0 Post-Installation Configuration Settings Worksheet.” This document includes descriptions and notes for each configuration setting, and also includes a column where the decision is indicated.

The Worksheet also includes 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.

Since access to this configuration screen is limited to System Administrators, you will refer to the completed document when choosing the settings.

Note: [Costpoint Planning 8.0 Post-Installation 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.

The document includes a Decision column, where the choice for each setting should be indicated before the document is returned to you

- **Import Basic Mapping** — this step populates the Maintain Account Mapping screen.
- **Maintain Account Mapping** — this screen displays the results of the account mapping. Note, however, that the results can be validated by Accounting later from **Planning » Administration » Administration Controls » Maintain Account Mapping**. Verify the results and edit if necessary.
- **Finalize Setup** — on this final step, click **Finish** to complete the synchronization process.

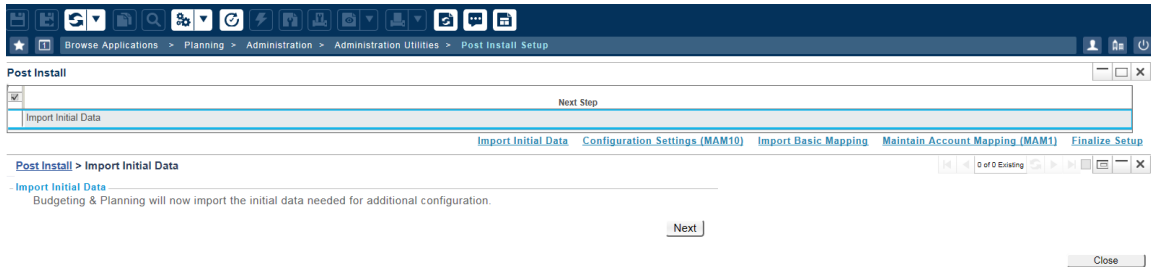
To run the Post-Install Setup wizard, click **Planning » Administration » Administration Utilities » Post Install Setup**.

Note: You can also stop the post installation setup at any step and later resume where you left off. . If you go back to a previous step to make changes, the configuration setup will begin from that point, and you will be required to complete the remaining steps again.

Step 2: Run the Post-Install Setup Wizard

Import Initial Data

This step of the wizard populates the initial data into the staging tables.



To import data:

1. In the table, select the **Import Initial Data** row.
2. Click **Next** to import the data and continue.

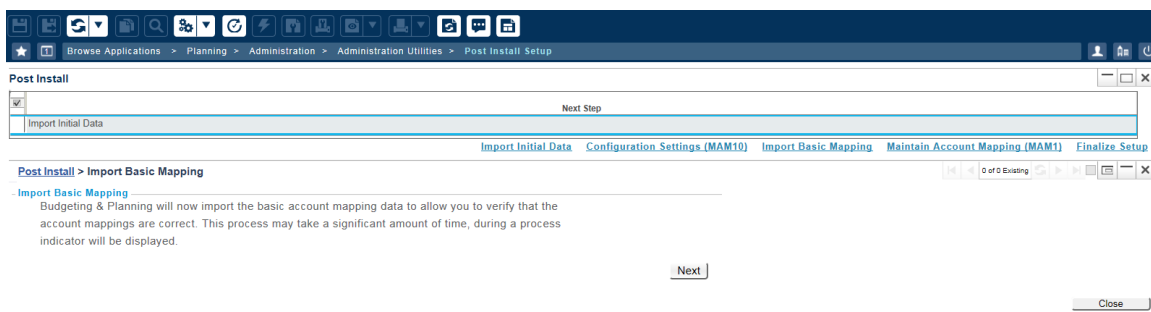
Configuration Settings

This step of the wizard requires you to complete fields on six separate tabs. Refer to the completed “Post-Installation Configuration Settings Worksheet” when choosing settings in this part of the wizard.

Note: The Post-Installation Utility can be run only one time. If you later need to change settings described in this step of the utility, click **Planning » Administration » Administration Controls » Configuration Settings**.

Import Basic Mapping

This step of the wizard imports the basic account mapping. You will review the results of the import in the next step.



To import mapping:

1. Click **Next**.
2. Click **Save & Continue**.

Step 2: Run the Post-Install Setup Wizard

Maintain Account Mapping

In this step of the wizard, you will verify that the accounts imported in the previous step are mapping correctly. Use the Maintain Account Mapping screen to maintain system rules for the treatment of G/L accounts.


Depending on the field, you can enter or select which cost type, account type, report type, budget sheet, and major key an account is assigned to.

This grid displays all summary level accounts only and maps the accounts to the report types for reporting purposes. Most of the accounts will be set up correctly from your accounting system, but Deltek recommends that you review and verify some of the accounts.





Note: This screen can be opened later from **Planning » Administration » Administration Controls » Maintain Account Mapping**.


To verify and/or edit your account mappings:

1. On the Maintain Account Mapping form, complete the following fields to filter the display of account mappings:

Field	Description
Account ID	This field displays the account ID table. Note: this will show the accounts at the level in which 'Configuration Settings / Account / Summary Account Level' has been set (unless the branch does not go down that low and then will show level higher in the tree)
Account Name	This field displays the account name of the Account ID.
Cost Type	To change the Cost Type, click  and select from the following options:

Step 2: Run the Post-Install Setup Wizard

Field	Description
	<ul style="list-style-type: none"> Direct Indirect Revenue Balance Sheet
Account Type	<p>To change the Account Type, click  and select from the following options:</p> <ul style="list-style-type: none"> Labor Non Labor Fringe Labor
Report Type	<p>To change this option, click  and select from the list of available report types.</p>
Major Key	<p>To change this option, click  and select from the list of Major Key descriptions.</p>
Budget Sheet	<p>To change this option, click  the budget tab on which this account will be available.</p>
New Accounts	<p>Select this check box limit the results to just the new records that have been imported since the last time you reviewed them.</p>

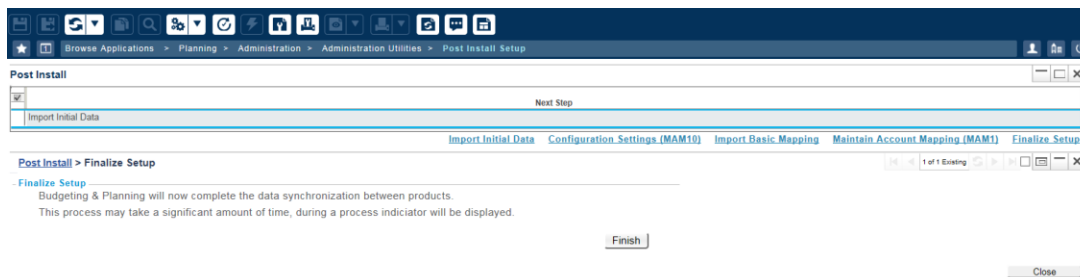
- Click Execute to populate the Accounts table.
- In the Accounts table, modify the account mapping if needed.
- Click .

If you make changes to this page and run the refresh process, the refresh process will only pull in new records from the accounting system.

- Click **Next**.

Finalize Setup

On this final step, click **Finish** to complete the synchronization process between products.



Step 2: Run the Post-Install Setup Wizard

When you click **Finish**, the remainder of the Refresh Process is completed. After it concludes, the **Post-Installation Setup Completed** box on the General tab is automatically selected.

□ Step 3: Set Up the Refresh Process

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

Note: Steps described in this section apply to both new and upgrading customers.

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 **B&P Refresh Process**.
4. Click **Save & Continue**.

Step 3: Set Up the Refresh Process

- 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:

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

- 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	<p>In the table, complete the following fields:</p> <ul style="list-style-type: none"> 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.

- Click .
- 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.

Step 3: Set Up the Refresh Process

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

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

Assign Queue to Job Server

To assign a job to the queue:

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

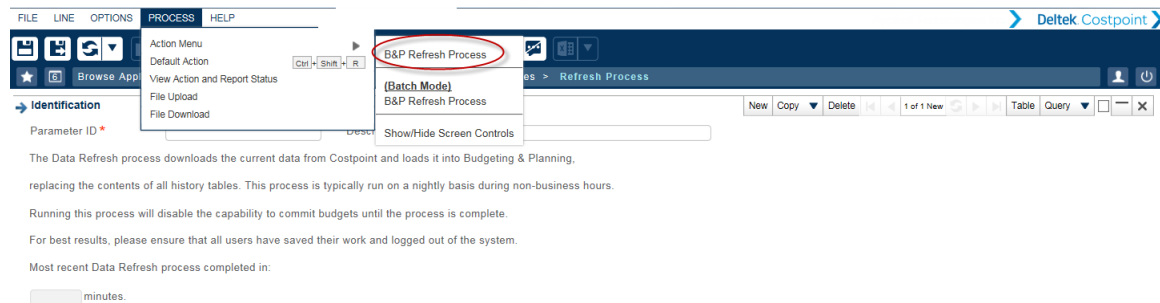
Field	Field Value
Job Queue	Enter BNP .
Active for Server	This field should be checked.

- Click .
- Click **Start**.
- Exit the **Start/Stop Job Server** application.

□ Step 4: 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 5: Add Users to Costpoint

In this step, you will add employees to Costpoint.

Note: If your installation of Costpoint Planning is new, but you are an established Costpoint customer and your employees already exist within Costpoint, you can skip to [Step 7: Enable User Security and Licensing Options](#).

To add users in Costpoint:

1. Click **Planning » Administration » System Security » Manage Users**.

This screen has the following tabs:

- **Information** — Enter user information, such as password, status, assign a preferred notification method, and assign permissions to change user information.
- **Workflow** — Specify workflow and email user preferences.
- **Printing Defaults** — Enter a user's default Web printing settings and locale (if they differ from the system defaults).
- **Authentication** — Define how Costpoint verifies user login.
- **User Interface** — Specify settings for screen configuration changes.

2. Click **New** to add a user.

Note: Detailed information about this screen is available from within the Costpoint online help. After you open the Manage Users screen, click Help on the Costpoint Help menu.

3. Click .

□ Step 6: 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.

The Manage User Group feature enables you to create separate menus for a single user or group of users.

Although the licensing structure in version 7.0 enables you to automatically limit access to only the modules, screens, tabs, and reports by user type (for example, project manager, organizational manager, or administrator), this feature enables you to further limit the access to smaller subsets of users within the existing licensing structure.

Observe the following rules in creating User Groups:

- Restrictions created in the User Group to certain areas of Costpoint Planning apply to members of the group even if the license types allow it.

Note: Assigning employees the role of Accountant or Administrator can grant access to menu items that fall outside the license type. However, if the employees are assigned to a User Group with restrictions to those items, they cannot view the said menu items.

- Certain areas in Costpoint Planning that are viewable to a user security group can only be viewed by the group's members if the license types also allow it.

To set up users in Costpoint:

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

The screenshot shows the 'Manage User Groups' interface. The main window has a breadcrumb trail: 'Browse Applications > Planning > Administration > System Security > Manage User Groups'. It contains a table of 'User Groups' with columns for 'User Group ID', 'Name', and 'Active Directory ID (sAMAccountName)'. The table lists several groups, including 'B&P', 'BP_PROJECT', 'BP_USER', 'CER__ACCTG', 'CER__ADMIN', and 'CER__ADV'. Below this table are tabs for 'Assign Users to Group', 'Module Rights', 'Application Rights', 'Active Directory Groups', and 'UI Profiles'. The 'Assign Users to Group' sub-window is open, showing a table with columns for 'User', 'Name', and 'Company'. It lists users like 'AMIE', 'CPSUPERUSER', 'MM01', and 'RUBEN_REG'.

User Group ID *	Name *	Active Directory ID (sAMAccountName)
B&P	B&P Project Only	
BP_PROJECT	B&P Project Only	
BP_USER	B&P Users	
CER__ACCTG	CER Accounting	
CER__ADMIN	CER Cloud Administrator	
CER__ADV	CER Advanced User	

User *	Name	Company *
AMIE	AMIE	ALL
CPSUPERUSER	Costpoint Super User	ALL
MM01	MM01	ALL
RUBEN_REG	Ruben Laguna - BPCP711TE10MSSREGM	ALL

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.

- 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.

Step 6: Assign Users to User Groups

- **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.

Note: 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 7: 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	License Type	Security Org ID	Home Org ID
ADMIN			<input checked="" type="checkbox"/>	Full	ALL	1.1.1
AMIE	AMIE		<input type="checkbox"/>	None		
ARZEN_REG	ARZEN - Regression user ID		<input checked="" type="checkbox"/>	Reporting	ALL	1.1.110
BPCP701TE09ORAREGM	BPCP701TE09ORAREGM		<input type="checkbox"/>	None		
CPSUPERUSER	Costpoint Super User		<input checked="" type="checkbox"/>	Full	ALL	0.1.01
ESABULAO	ESabulao		<input type="checkbox"/>	None		
ESABULAO_02	ESABULAO		<input checked="" type="checkbox"/>	Reporting		
FULL	Full User		<input checked="" type="checkbox"/>	Full	ALL	1.1.1
FULL_REG			<input checked="" type="checkbox"/>	Reporting	1.1.100	1.1.123
JEREMY_REG	JEREMY_REG		<input checked="" type="checkbox"/>	Full	ALL	1.1.1
KYONIO	KY ONIO		<input checked="" type="checkbox"/>	Full	ALL	
MM01	MM01		<input type="checkbox"/>	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 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 user, review, and where necessary, edit values in the following fields:

Field	Field Value
Active	<p>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.</p> <p>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.</p> <p>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.</p>
License Type	<p>Use this drop-down list to assign an available license type to a user. Choose from the following:</p> <ul style="list-style-type: none"> ▪ None- Select this option if the user does not have rights. ▪ Full – This license provides access to all modules within the Planning Domain.

Step 7: Enable User Security and Licensing Options


Field	Field Value
	Menu access is controlled by license type and can further be restricted by user security.
Security Org ID	<p>Use this setting to assign users access to a specific Security Org ID within Costpoint Planning</p> <p>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.</p> <p>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.</p> <p>Note also that Org security for Costpoint Planning is separate from and unrelated to Costpoint Org security.</p>
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 8: 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: Other Tasks

This concludes all of the post-installation configuration tasks that must be completed prior to first-use. However, there are other tasks related to establishing roles and managing users in Org and Project Budgeting, such as the following:

- **Maintain generic staff** – Establish generic job categories that are useful when you assign people that you do not already have on staff.
- **Maintain organizational budget approvers** – Establish who can create, edit and approve Org Budgets.
- **Maintain project budget approvers** – Establish the appropriate management authority structure that will underlie the budget creation and workflow process.

For more information on these additional tasks, see the “[Costpoint Planning 8.0: Manage Roles in Org and Project Budgeting](#)” guide.

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

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