

Deltek



Costpoint

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## Introduction

Deltek leverages Generative Artificial Intelligence (GenAI) to revolutionize how project-based businesses manage and interact with their data. is the AI-powered intelligent business companion built into our portfolio of solutions that provides intelligence, assistance, and automation to Deltek products and our users. This document provides an overview of how Deltek Costpoint uses the GenAI capabilities of Dela. It covers the integration of GenAI into the platform, its various functionalities, and the benefits it brings to users. Additionally, it details Deltek's approach to using best-in-class GenAI partners who are committed to protecting your data.

Costpoint's GenAI capabilities significantly enhance user experience and efficiency across multiple dimensions, including:

- **Comprehensive Data Navigation:** Dela navigates through Costpoint data, enabling users to easily locate and access information from any part of the system they are allowed to access.
- **Advanced-Data Analysis:** Dela can merge and summarize data providing users with insights that were previously challenging or time-consuming to obtain.
- **Cross-Application Accessibility:** Depending on the user's access level, Dela can retrieve and analyze data from various applications, eliminating the need for users to have expert knowledge in multiple applications.
- **Time Savings:** Dela can access and compile information from multiple sources, which significantly reduces the time users spend on data management tasks.
- **Improved Performance:** By automating routine tasks and providing quick access to data, Dela enhances overall business performance.
- **User Empowerment:** With Dela, users don't need to be experts to analyze data effectively. This democratizes data access while still respecting system-wide security and organizations policies, making it easier for everyone to make informed decisions.
- **Operational Efficiency:** Dela's ability to perform actions on behalf of users (like drafting emails) further optimizes operational efficiency, allowing for a smoother, more streamlined workflow.

- **Actionable Commands:** Users can issue commands through [Ask Dela](#), their digital assistant within Costpoint, to perform specific actions, such as entering time, approving workflow, or further streamlining daily tasks and operations.

## Deltek AI Vendors

Deltek selects its AI vendors through a rigorous process, grounded in principles that align with our commitment to excellence, innovation, privacy, and security. This not only advances our technological capabilities but also safeguards our clients' interests and data.

When choosing AI vendors, Deltek considers:

- **Technological Advantage and Innovation**  
Our vendors must demonstrate a clear edge in technology and innovation. We look for entities that are leaders in their field, offering cutting-edge solutions that drive efficiency, enhance functionality, and anticipate future market needs.
- **Data and Environment Security**  
Security and privacy are non-negotiable. We use AI vendors that have comprehensive, robust security frameworks to protect against data breaches and cyber threats. This includes adherence to international security standards and practices, promoting the safety and integrity of data and operational environments. Our partners must prioritize the protection of all data, reflecting a strong commitment to privacy and security.
- **Strict Privacy Controls**  
It is critical that our vendors have transparent policies regarding data usage that explicitly forbid the use of customer data for training their AI models.

For purposes of Costpoint, Deltek has chosen Microsoft's Azure OpenAI service as its vendor. This decision reflects Microsoft's leadership in technology innovation, commitment to data security and privacy, and scalability of solutions ensuring that our customers benefit from cutting-edge, secure, and reliable services.

Here are several reasons why Microsoft Azure OpenAI service was a good fit for Deltek Costpoint.

### **Cutting-Edge AI Research and Development:**

OpenAI is renowned for its groundbreaking work in AI, including the development of advanced models like GPT (Generative Pretrained Transformer). Their commitment to pioneering AI technologies sets a high bar for innovation and capability.

### **Data Privacy and Security for Microsoft's Azure OpenAI Service:**

Microsoft's Azure OpenAI Service is a leader in data privacy and security, offering unmatched protection for sensitive information across industries. With a robust framework designed to comply with global standards such as GDPR, HIPAA, and FedRAMP, Azure ensures that customer data is not retained or used for training large language models, guaranteeing confidentiality. For government clients, the service extends its capabilities to GCC (Government Community Cloud) and GCC High, meeting the strict compliance requirements of U.S. federal, state, and local agencies. These environments include advanced encryption, secure access controls, and the option to use a "bring your own key" (BYOK) model for full control over encryption keys. Visit [Microsoft Data, privacy, and security for Azure OpenAI Service](#) for additional information.

**Wide Range of Applications:**

The Azure OpenAI service caters to a broad spectrum of potential uses making it the perfect vendor as Deltek continues to innovate using GenAI.

# Technical Implementation

## Overview

At this time, Costpoint's GenAI capabilities leverage the OpenAI GPT 4 Omni Model through Microsoft Azure services.

This integration required careful planning and implementation of Azure's security and privacy features. By leveraging Azure's comprehensive suite of security tools and services, Costpoint uses a secure and efficient connection to the GPT-4 OmniAPI thereby protecting our customer's data.

**For Costpoint SaaS (GCC and GCCM) and on-premises customers, Deltek will maintain the license/API key for the Azure OpenAI Service. For Costpoint customers who wish to use an existing agreement with Microsoft or manage their own product key, the product will include the capability to utilize the "Bring Your Own Key" model for integration with Azure Cloud. On-premises customers who wish to use Azure Government Cloud (GCC High) must bring their own key.**

In the main interaction loop of Costpoint's GenAI capabilities, users initiate queries about Costpoint data by typing their questions into Ask Dela. These inquiries are then submitted to Azure OpenAI, accompanied by a concise set of system prompts and callable functions. This design strategy prioritizes a minimalistic approach to the number of functions to ensure the compactness of request sizes and to facilitate swift GenAI responses. For follow-up questions, Costpoint submits these to Azure OpenAI alongside the initial prompts/functions and any additional context-related information, maintaining the continuity and relevance of the dialogue.

Upon receiving a query from a Costpoint user, the Ask Dela processes the request, pinpointing the relevant entity or entities within the Costpoint informational architecture. Subsequently, it activates specific, pre-designed functions, such as "FindPerson" or "FindProject," to accurately retrieve the information sought. This process is designed to understand and formulate queries targeted at specific data sets or tasks within Costpoint, enhancing its capability to access details or perform actions based on the user's request. Furthermore, the system is capable of parsing SQL statements generated by itself and adapting these to align with Costpoint's unique data retrieval methods. This includes handling queries that require working with subdocument conditions or performing data aggregation, thereby streamlining the user's interaction with Costpoint's complex data structures and facilitating an efficient and user-friendly querying process.

Costpoint supports load balancing across multiple AI instances to enhance both overall throughput and reliability. Microsoft has data centers in numerous regions, allowing customers

to, for example, procure one instance of Azure OpenAI in the East region and another in the West region. This approach enables customers to specify the best operational regions and safeguard AI service availability in case of a failure in a specific region. Costpoint will automatically balance the load between AI model instances in the event of timeouts.

On-premises customers may benefit from increasing their total TPM (tokens per minute) and enabling automatic balancing between regions and different API keys pools upon reaching a token limit (e.g., prioritizing prepaid instances over Pay-As-You-Go).

Due to the service agreement with Microsoft, Deltek is subject to certain limitations. Given the high demand, some users might occasionally encounter slight delays or brief unavailability of the Costpoint GenAI capabilities. Deltek is working closely with Microsoft to overcome these limitations.

## AI Functionality

### *Ask Dela*

With Costpoint version 8.2.12, we introduced *Ask Dela*, the digital assistant within Costpoint, providing users with an innovative and easy-to-use way that simplifies their daily tasks. By leveraging the power of GenAI, *Ask Dela* streamlines the process of accessing data and completes tasks with remarkable ease.

- Start a conversation using either text or voice to quickly locate the data you need. For example, "What is the project status and contact information for the project manager for Project ABC?"
- As the conversation continues, ask follow-up questions or click links included in the conversation to open related applications and records.
- You can easily copy, share, or email responses or even ask the Assistant to email or make a phone call when applicable.
- Users can leverage *Ask Dela* to enter time, sign timesheets, approve workflows and submit expenses.

Access *Ask Dela* by clicking either the AI button on the Navigation Toolbar or the floating Assistant icon. Additionally, users can effortlessly access their conversation history or start a new conversation.

Security is always top of mind. *Ask Dela* enforces the Costpoint access permissions that have been established for each Costpoint user. *Ask Dela*'s access is bound by these Costpoint security policies, meaning it cannot give the user access to data that would violate these policies.

Lastly, as explained in detail below, administrators can always enable and disable *Ask Dela* in Configure System Settings.

### Smart Summaries™

This functionality focuses on distilling the essence of complex contracts into easily digestible summaries. By highlighting key details such as DPAS ratings, contract numbers, and specific administrative pointers, it aims to simplify the oversight of agreements and enhance decision-

making capabilities. The goal is to cut through the noise, presenting the crucial elements of contracts without the need for deep dives into contract application.

## Configuring Dela in Costpoint

As part of our commitment to helping you protect your information, Costpoint's Dela capabilities are disabled by default. The Costpoint administrator must check the "Enable Dela" flag under the Corporate Settings section in the System Configuration application. The Costpoint administrator will be prompted to confirm their selection before the capability is activated.

### For Cloud Customers

Dela capabilities, including Ask Dela and Smart Summaries, are available to Costpoint Cloud customers who have upgraded to version MR 8.2.8+ and to Costpoint GCCM customers starting with the release of version 8.2.15. Dela functionality for Costpoint GCCM utilizes the Microsoft Azure Government Cloud High (GCC-High) deployment of OpenAI. The Costpoint administrator must enable the "Enable Dela" flag in the Corporate Settings section of the System Configuration application.

### For On-Premises Customers

Costpoint on-premises customers using version 8.2.14 or earlier must establish their own agreement with Microsoft to obtain a key. On-premises customers with Costpoint version 8.2.15 or higher already have Dela included but retain the option to utilize the "bring your own key" model. On-premises customers who wish to use Azure Government Cloud (GCC High) are required to bring their own key.

Costpoint supports load balancing between multiple AI instances to enhance both overall throughput and reliability. For example, customers may have a mixture of PTU (prepaid) and Pay as You Go instances. Costpoint will always try to use (prepaid) capacity (Pool 1) first and will only attempt to use (Pool 2) if Pool 1 capacity is exhausted.

## Security and Data Storage

At Deltek, we take security extremely seriously. Deltek has implemented and rigorously adheres to data security best practices so that we can help you protect your sensitive and confidential information.

### **Data Access and Storage**

The Azure OpenAI service is a stateless API, and data is not shared between clients. Furthermore, Microsoft has confirmed that data submitted to the Azure OpenAI service will not be used to train their AI models or retained.

Your data, including prompts (inputs), completions (output content), organizational embeddings, and any other data you provide to Microsoft by using the Costpoint AI capability is not accessible to OpenAI. Microsoft hosts the OpenAI models within its Azure environment, and the Azure OpenAI Service does not interact with any services operated by OpenAI.

Your Costpoint instance will also not store the content of inquiries, questions, or AI responses. The only exception is if a customer explicitly requests the activation of Costpoint Debug Mode for specific troubleshooting purposes in a designated system. This will trigger logging of AI-related content. However, Costpoint Assistant allows users to save their chat history on their local machines. The data is encrypted and stored in the user's web browser storage and is inaccessible to Costpoint Administrators or Deltek personnel. Users cannot access this data from any other web browser or device. However, the Costpoint administrator has the ability to disable this feature for the entire organization.

### **Security Controls and User Permissions**

Costpoint AI utilizes the same security framework as the user logged into the system. Costpoint AI, therefore, follows the same security policies and has the same level of access permissions and visibility as the active user.

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## Additional Resources:

- [Dela in Costpoint Video](#)
- [Costpoint AI Security Blog](#)
- [AI Security & Trust Webpage](#)
- [Costpoint Release Blogs](#)
- [Release Notes](#)
- [Costpoint Information Center](#) (CIC) for On-Premises customers
- [Costpoint Cloud Information Center](#) (CCIC) for SaaS customers
- [Microsoft Data, privacy, and security for Azure OpenAI Service](#)
- [Microsoft data protection and privacy resource](#)
- [The Microsoft Responsible AI Standard](#)