

# Deltek Costpoint Business Intelligence 8.0 Models Overview

This overview introduces the Deltek-provided framework models in Costpoint Business Intelligence (CBI).

1. Terminology

2. Row Security

3. Framework  
Models

4. Open a  
Package

5. Navigate a  
Package

## Navigation:

- Use the **Page Down** key to proceed through the click-thru.
- Use the **Page Up** key to return to a prior slide.



## Hello. Welcome to Costpoint

### Bus Inte

Unear  
exper

Costpoint Business Intelligence (CBI) provides numerous Framework Manager models that support dashboards and over a hundred reports.

To better understand what we cover in this overview, let's begin with the terminology most commonly used in CBI.



### How-to catalog

Watch short videos to learn how to use Cognos Analytics and start gaining insights into your data.





# Hello, Business Intelligence

Unearth hidden  
experiences



## How-to catalog

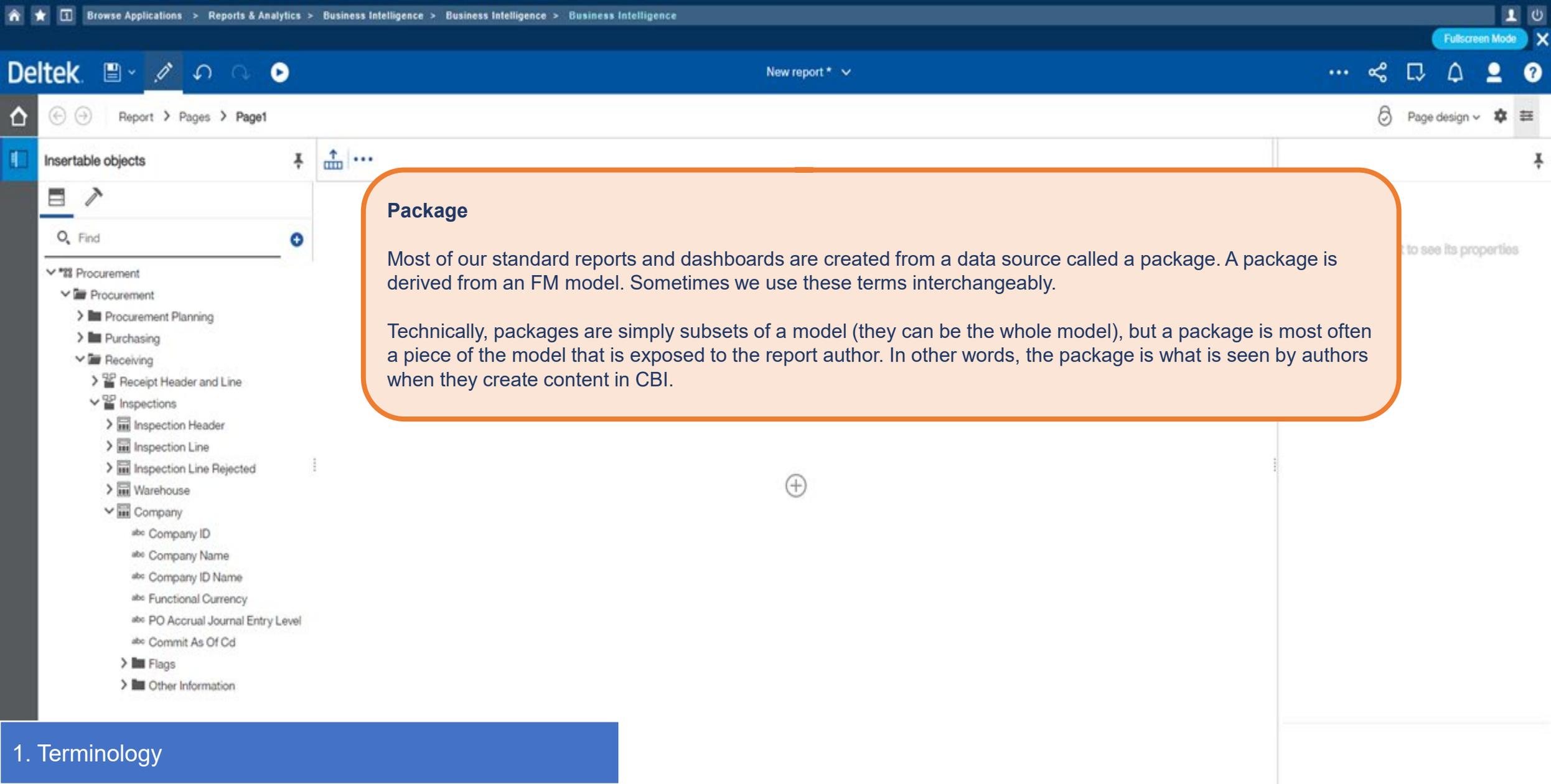
### Framework Manager Model

A Framework Manager model, or FM model, is a container that stages data and makes it easy for you to create new content. Every report or dashboard that is created requires a data source or model. Data in models have English names and are organized in folders. This organization provides a business view of the data for ease of use. In short, the models are used for data prepping or staging. Models can include:

- Relationships between tables
- Calculations
- Rules for aggregations
- Filters to restrict records or improve performance

Show welcome





## Package

Most of our standard reports and dashboards are created from a data source called a package. A package is derived from an FM model. Sometimes we use these terms interchangeably.

Technically, packages are simply subsets of a model (they can be the whole model), but a package is most often a piece of the model that is exposed to the report author. In other words, the package is what is seen by authors when they create content in CBI.



# Hello. Welcome to Business Intelligence.

Unearth hidden insights with a pe  
experience driven by AI.



How-to catalog

## Data Module

A data module is another data source or model that can be used in reports and dashboards. This is relatively new functionality, so we have a limited library of data modules established. However, since this is considered the “next generation” modeling tool, you will likely see more data modules in future releases.

There is a lot of overlap in functionality between data modules and FM models. One key difference is that a Data Module is a web-based modeling tool.

For additional insight into data modules, please visit the DLZ for our Data Module training course. In this overview, we will focus on FM models and packages.



# Hello. Welcome to Costpoint Business Intelligence.

Unearth hidden insights with a personalized analytics experience driven by AI.



How-to catalog

Costpoint BI 8.0 includes several FM models for reporting and analytics, and they each include a certain aspect of row security.

So, what is row security?

**Revenue Summary Report Template**

Project	Owning Organization	Total Funded	ITD Revenue	Backlog	ITD Costs	ITD COM	ITD Profit	ITD Profit %
10000 - Housing Development	10.10.2.1 Gov-Engineering	50,000.00	27,400.00	22,600.00	26,189.08	0.00	1,210.92	4.42%
10002 - Test Workforce PLCs	10.10.2.1 Gov-Engineering	0.00	6,000.00	(6,000.00)	16,651.84	2,884.62	(13,536.46)	(225.61%)
10003 - Workforce not reqd	10.10.2.1 Gov-Engineering	0.00	0.00	0.00	20,537.26	0.00	(20,537.26)	0.00%
10006 - Test FAYTD Rev	10.10.1.3 TEST NEW ORG	350,000.00	100,000.00	250,000.00	0.00	0.00	100,000.00	100.00%
10007 - Test FAYTD	10.10.2.1 Gov-Engineering	750,000.00	325,000.00	425,000.00	0.00	0.00	325,000.00	100.00%
10100 - TRAINING FACILITY	10.10.2.1 Gov-Engineering	25,540,110.00	11,243,993.78	14,296,116.22	9,897,545.43	0.00	1,346,448.35	11.97%
10105 - FAA TRAFFIC CONTROL SYS	10.10.2.1 Gov-Engineering	11,000,000.00	5,453,883.57	5,546,116.43	5,270,796.28	321,920.05	(130,832.76)	(2.55%)

**Revenue Summary Report Template**

Project	Owning Organization	Total Funded	ITD Revenue	Backlog	ITD Costs	ITD COM	ITD Profit	ITD Profit %
10000 - Housing Development	10.10.2.1 Gov-Engineering	50,000.00	27,400.00	22,600.00	26,189.08	0.00	1,210.92	4.42%
10002 - Test Workforce PLCs	10.10.2.1 Gov-Engineering	0.00	6,000.00	(6,000.00)	16,651.84	2,884.62	(13,536.46)	(225.61%)
10003 - Workforce not reqd	10.10.2.1 Gov-Engineering	0.00	0.00	0.00	20,537.26	0.00	(20,537.26)	0.00%
10007 - Test FAYTD	10.10.2.1 Gov-Engineering	750,000.00	325,000.00	425,000.00	0.00	0.00	325,000.00	100.00%
10100 - TRAINING FACILITY	10.10.2.1 Gov-Engineering	25,540,110.00	11,243,993.78	14,296,116.22	9,897,545.43	0.00	1,346,448.35	11.97%
10105 - FAA TRAFFIC CONTROL SYS	10.10.2.1 Gov-Engineering	11,000,000.00	5,453,883.57	5,546,116.43	5,270,796.28	321,920.05	(130,832.76)	(2.55%)
10150 - SURVEILLANCE SERVICES	10.10.2.1 Gov-Engineering	1,500,000.00	1,035,910.00	464,089.90	958,308.05	23,053.29	54,548.76	5.27%
10300 - SIMULATOR - COST PLUS	10.10.2.1 Gov-Engineering	0.00	1,229.05	(1,229.05)	1,147.68	0.00	81.37	6.62%
10400 - NAVY DESTROYER (1443)	10.10.2.1 Gov-Engineering	12,512,000.00	1,874,966.55	10,637,043.45	1,561,441.87	0.00	313,514.68	16.72%
10500 - COMMUNICATIONS TRACKING	10.10.2.1 Gov-Engineering	400,000.00	425,418.92	(25,418.92)	447,099.36	0.00	(21,680.44)	(5.10%)

**Row security**, also called Model security, filters the data (rows) that a user can see in a report or dashboard.

All models located in the root of the Packages folder offer some level of row security, except the Contracts Reporting package.

The different aspects of row security are:

- Labor Suppression
- Organizational
- Project
- Functional Role
- Part

Here is a view of the same report run for two different users. In the front image, the user is limited to only see rows where the Org is 10.10.2.1.

The screenshot displays the Deltek software interface. On the left is a dark grey navigation sidebar with icons and labels for Home, Search, My content, Team content (highlighted in blue), Company content, and Recent. The main content area is titled "Team content > \*Packages\*" and contains a list of items, each with a folder icon, a title, and a timestamp:

- ~Legacy Packages (CER 7.1.x)~  
3/30/2020 11:42 AM
- Accounts Payable  
6/24/2020 6:29 AM
- Accounts Receivable  
6/22/2020 7:42 AM
- Contracts Reporting  
6/17/2020 4:03 AM
- General Ledger  
6/22/2020 8:08 AM
- Manufacturing  
7/13/2020 12:55 AM
- Materials  
6/17/2020 5:47 AM
- Procurement  
7/15/2020 4:54 AM
- Project Analysis  
6/22/2020 6:31 AM
- Project Planning Analysis  
6/26/2020 2:47 AM
- Project Planning Reporting  
7/21/2020 9:39 AM
- Project Reporting  
7/6/2020 5:52 AM
- Time  
4/30/2020 12:07 PM

**Labor Suppression** security restricts the ability to see labor rates and dollars at the employee level using the labor suppression flag settings in Costpoint.

In Costpoint Business Intelligence, the rate/cost of employees are hidden in reports when Labor Suppression is in use.

The screenshot shows the Deltek software interface. On the left is a dark grey navigation sidebar with icons and labels for Home, Search, My content, Team content (highlighted in blue), Company content, and Recent. The main content area is titled "Team content > \*Packages\*" and contains a list of items, each with a folder icon, a title, and a timestamp:

- ~Legacy Packages (CER 7.1.x)~  
3/30/2020 11:42 AM
- Accounts Payable  
6/24/2020 6:29 AM
- Accounts Receivable  
6/22/2020 7:42 AM
- Contracts Reporting  
6/17/2020 4:03 AM
- General Ledger  
6/22/2020 8:08 AM
- Manufacturing  
7/13/2020 12:55 AM
- Materials  
6/17/2020 5:47 AM
- Procurement  
7/15/2020 4:54 AM
- Project Analysis  
6/22/2020 6:31 AM
- Project Planning Analysis  
6/26/2020 2:47 AM
- Project Planning Reporting  
7/21/2020 9:39 AM
- Project Reporting  
7/6/2020 5:52 AM
- Time  
4/30/2020 12:07 PM

**Organizational** security suppresses org-specific data from a user based on their Org security settings established in Costpoint or Costpoint Planning.

When Organizational security is in place, reports and dashboards display data that are only within your organization, making your data more secure.

If Organizational security is not established in Costpoint or Costpoint Planning, CBI models will not be able to restrict data by organization or company.

The screenshot displays the Deltek software interface. On the left is a dark grey navigation sidebar with icons and labels for Home, Search, My content, Team content (highlighted in blue), Company content, and Recent. The main content area is titled 'Team content > \*Packages\*' and contains a list of items, each with a folder icon, a title, and a timestamp. The items are: ~Legacy Packages (CER 7.1.x)~ (3/30/2020 11:42 AM), Accounts Payable (6/24/2020 6:29 AM), Accounts Receivable (6/22/2020 7:42 AM), Contracts Reporting (6/17/2020 4:03 AM), General Ledger (6/22/2020 8:08 AM), Manufacturing (7/13/2020 12:55 AM), Materials (6/17/2020 5:47 AM), Procurement (7/15/2020 4:54 AM), Project Analysis (6/22/2020 6:31 AM), Project Planning Analysis (6/26/2020 2:47 AM), Project Planning Reporting (7/21/2020 9:39 AM), Project Reporting (7/6/2020 5:52 AM), and Time (4/30/2020 12:07 PM). At the top right of the main area are icons for adding, filtering, and sorting.

Item Name	Timestamp
~Legacy Packages (CER 7.1.x)~	3/30/2020 11:42 AM
Accounts Payable	6/24/2020 6:29 AM
Accounts Receivable	6/22/2020 7:42 AM
Contracts Reporting	6/17/2020 4:03 AM
General Ledger	6/22/2020 8:08 AM
Manufacturing	7/13/2020 12:55 AM
Materials	6/17/2020 5:47 AM
Procurement	7/15/2020 4:54 AM
Project Analysis	6/22/2020 6:31 AM
Project Planning Analysis	6/26/2020 2:47 AM
Project Planning Reporting	7/21/2020 9:39 AM
Project Reporting	7/6/2020 5:52 AM
Time	4/30/2020 12:07 PM

**Functional Role** security is a new level of security for the Time model that restricts data based on a user's Functional Role(s) over employees (resources managers) and/or projects (project managers).

- Home
- Search
- My content
- Team content**
- Company content
- Recent

Team content > \*Packages\*

~Legacy Packages (CER 7.1.x)~	3/30/2020 11:42 AM
Accounts Payable	6/24/2020 6:29 AM
Accounts Receivable	6/22/2020 7:42 AM
Contracts Reporting	6/17/2020 4:03 AM
General Ledger	6/22/2020 8:08 AM
Manufacturing	7/13/2020 12:55 AM
Materials	6/17/2020 5:47 AM
Procurement	7/15/2020 4:54 AM
Project Analysis	6/22/2020 6:31 AM
Project Planning Analysis	6/26/2020 2:47 AM
Project Planning Reporting	7/21/2020 9:39 AM
Project Reporting	7/6/2020 5:52 AM
Time	4/30/2020 12:07 PM

Project security restricts project data.

The screenshot displays the Deltek software interface. On the left is a dark grey navigation sidebar with icons and labels for 'Home', 'Search', 'My content', 'Team content' (highlighted in blue), 'Company content', and 'Recent'. The main content area is titled 'Team content > \*Packages\*' and contains a list of reports, each with a folder icon, the report name, and a timestamp. The reports listed are: '~Legacy Packages (CER 7.1.x)~' (3/30/2020 11:42 AM), 'Accounts Payable' (6/24/2020 6:29 AM), 'Accounts Receivable' (6/22/2020 7:42 AM), 'Contracts Reporting' (6/17/2020 4:03 AM), 'General Ledger' (6/22/2020 8:08 AM), 'Manufacturing' (7/13/2020 12:55 AM), 'Materials' (6/17/2020 5:47 AM), 'Procurement' (7/15/2020 4:54 AM), 'Project Analysis' (6/22/2020 6:31 AM), 'Project Planning Analysis' (6/26/2020 2:47 AM), 'Project Planning Reporting' (7/21/2020 9:39 AM), 'Project Reporting' (7/6/2020 5:52 AM), and 'Time' (4/30/2020 12:07 PM). At the top right of the main area are icons for adding, filtering, and sorting.

Report Name	Timestamp
~Legacy Packages (CER 7.1.x)~	3/30/2020 11:42 AM
Accounts Payable	6/24/2020 6:29 AM
Accounts Receivable	6/22/2020 7:42 AM
Contracts Reporting	6/17/2020 4:03 AM
General Ledger	6/22/2020 8:08 AM
Manufacturing	7/13/2020 12:55 AM
Materials	6/17/2020 5:47 AM
Procurement	7/15/2020 4:54 AM
Project Analysis	6/22/2020 6:31 AM
Project Planning Analysis	6/26/2020 2:47 AM
Project Planning Reporting	7/21/2020 9:39 AM
Project Reporting	7/6/2020 5:52 AM
Time	4/30/2020 12:07 PM

**Part** security restricts a user from seeing into reports or data that contain unauthorized parts based on part security setup.



Delttek

Welcome

1/2 Alerts &lt; &gt; What's New To read about what's new in Getting Started, click More Info.

Home

Search

My content

Team content

Recent

Manage



## Hello. Welcome to Costpoint Business Intelligence.

Unearth hidden insights with a personalized analytics experience driven by AI.



How-to catalog

The following Delttek framework models were recently added in Costpoint BI:

- Accounts Payable
- Accounts Receivable
- Contracts Reporting
- General Ledger
- Manufacturing
- Materials
- Procurement
- Projects
- Project Analysis
- Project Reporting
- Project Planning Analysis
- Project Planning Reporting
- Time

These are highlighted because they utilize Dynamic Query Mode (DQM), which means you can use them to create reports *and* dashboards.

The Legacy or older models were published in Compatible Query Mode (CQM) and cannot be used for dashboard creation.



Find

- ▼ Accounts Payable
  - ▼ Accounts Payable
    - ▼ Vendor Information
      - ▼ Basic Information
        - > Vendor
        - > Payments
        - > Vendor Performance
        - > Vendor Controls
      - > Checks and Vouchers
  - ▼ FM Model Version
    - abc Model Version
    - abc Build Number
    - abc Application Version
  - ▼ Project Level Filter
  - ▼ Account Level Filter

The Accounts Payable model lets you create reports and dashboards that display accounts payable content. This model includes Organizational security and is used by the Accounts Payable Aging Report.

To use this model, click **Team content » \*Packages\* » Accounts Payable**.



Find



- ✓  Accounts Receivable
  - >  Customer Information
  - >  Invoice and Detail History
  - >  Multicurrency Unrealized
  - >  AR Summary Data
  - >  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 supports Organizational and Project security.

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



Find



Contracts Reporting

Reporting

Opportunities

Opp Info

GovWin IQ

OCI Info

Activities

Documents

Opp Audit

Filters

Contracts

The Contracts Reporting model does not use row security.

To use this model, click **Team content » \*Packages\* » Contracts Reporting.**



Find



▼  General Ledger

>  Basic Financial Architecture

>  Financial Reporting

>  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 helps you create reports and financial statements that leverage the Organizational 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**.



Find



Manufacturing

- > Bill of Materials
- > Production Control
- > Material Requirement Planning
- > Master Production Scheduling
- > Materials Estimating
- > Routing
- > Engineering Change Notice
- > Part Data Security
- > Model Version

The Manufacturing model supports Organizational and Part security for standard and ad hoc reports, as well as the Manufacturing dashboard.

To use this model, click **Team content » \*Packages\* » Manufacturing**.



Find



▼  Materials

▼  Inventory

>  Inventory

>  Inventory Transactions

>  Physical Count Info

>  Reservations

>  Settings

>  Unposted Inventory Transaction Status

>  Inventory Abbreviation Pegging

>  Inventory Burden

>  Sales Orders

>  Product Definition

The Materials model supports Organizational and Part security for standard and ad hoc reports for Sales Orders, Product Definition, and Inventory.

To use this model, click **Team content » \*Packages\* » Materials**.



Find



▼ Procurement

▼ Procurement

▼ Procurement Planning

> Requisition Header

> Requisition Line

> Requests for Quotes

> Vendor Quotes

▼ Purchasing

> Purchase Order Header and Line

> Purchase Order Line and Line Account

> PO Commitments

▼ Receiving

> Receipt Header and Line

> Inspections

The Procurement model supports Organizational and Part security for standard and ad hoc reports, as well as the Procurement dashboard.

To use this model, click **Team content » \*Packages\* » Procurement**.



Find



Project Reporting

Project Reporting

- > Project Basic Information
- > Labor History
- > Report Project Labor Summary
- > Report Revenue Summary
- > Project Status Report
- > PSR Summary Data
- > General Ledger Detail
- > T&M Analysis
- > Revenue Worksheet
- > Level Filters
- > FM Model Version

The Project models support Organizational, Labor Suppression, and Project security.

These models are in:

- **Team content » \*Packages\* » Project Reporting**
- **Team content » \*Packages\* » Project Analysis**



Find



▼  Project Planning Reporting

- >  Project Status Trend
- >  Project Status Details
- >  General Ledger Detail
- >  A/R Header History
- >  Resource Management
- >  FM Model Version

The Project Planning models support Organizational, Labor Suppression, and Project security.

These models are in:

- **Team content » \*Packages\* » Project Planning Reporting**
- **Team content » \*Packages\* » Project Planning Analysis**



Find

- ▼ Time
  - ▼ Time Collection
    - ▼ Timesheets
      - > Timesheet Header
      - > Timesheet Schedule Period
      - > Timesheet Revision (Current)
      - > Timesheet Revision (All)
      - > Employee Information
      - > Timesheet Audit
      - > Company
      - > Timesheet Line
      - > Timesheet Day
    - ▼ Timesheet Start/Stop
      - abc Employee ID
      - abc Timesheet Schedule
      - abc Year
      - abc Period Number
      - # Sequence Number
      - # Line Number

The Time model includes Time security setup using functional roles.

To use this model, click **Team content » \*Packages\* » Time**.

# Row Level Security

Package	Organization	Project/PM	Labor Suppression	Functional Role	Parts
Accounts Payable	✓				
Accounts Receivable	✓	✓			
General Ledger	✓	✓	✓		
Contracts Reporting					
Manufacturing	✓				✓
Materials	✓				✓
Procurement	✓				✓
Project Analysis	✓	✓	✓		
Project Reporting	✓	✓	✓		
Project Planning Analysis	✓	✓	✓		
Project Planning Reporting	✓	✓	✓		
Time				✓	

Here is a convenient view of the security that applies to each model that is located in the root location of **Team content » Packages**.

Deltek CostpointBusinessIntelligence#0\_MFGModel.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Acrobat Team Tell me what you want to do... Share

A1 Item

Item	Type	Definition
FM Model Version	Model Query	Select *from
Org Security	Model Query	Select *from
DOCUMENT	Model Query	select DOCUMENT.DOCUMENT_KEY as DOCUMENT_KEY, DOCUMENT.DOCUMENT_ID as DOCUMENT_ID, DOCUMENT.DOCUMENT_RVSN_ID as DOCUMENT_RVSN_ID, DOCUMENT.DOC_TYPE_CD as DOC_TYPE_CD, DOCUMENT.C
EMPL	Model Query	select EMPL.EMPL_ID as EMPL_ID, EMPL.LV_PD_CD as LV_PD_CD, EMPL.TAXBLE_ENTITY_ID as TAXBLE_ENTITY_ID, EMPL.ORIG_HIRE_DT as ORIG_HIRE_DT, EMPL.ADJ_HIRE_DT as ADJ_HIRE_DT, EMPL.TERM_DT as TERM_DT
GL_CONFIG	Model Query	Select *from
INVT	Model Query	select INVT.INVT_ABBRV_CD as INVT_ABBRV_CD, INVT.PART_KEY as PART_KEY, INVT.PROJ_ID as PROJ_ID, INVT.PART_ID as PART_ID, INVT.PART_RVSN_ID as PART_RVSN_ID, INVT.LAST_ISS_DT as LAST_ISS_DT, INVT
INVT_ABBRV_CD	Model Query	select INVT_ABBRV_CD.INVT_ABBRV_CD as INVT_ABBRV_CD, INVT_ABBRV_CD.PROJ_ID as PROJ_ID, INVT_ABBRV_CD.INVT_ABBRV_NAME as INVT_ABBRV_NAME, INVT_ABBRV_CD.S_INVT_ACCT_TYPE as S_INVT_ACCT_TYPE,
INVT_PROJ	Model Query	select INVT_PROJ.PROJ_ID as PROJ_ID, INVT_PROJ.S_ROLLUP_CD as S_ROLLUP_CD, INVT_PROJ.S_CST_MTHD_CD as S_CST_MTHD_CD, INVT_PROJ.NET_GRP_ID as NET_GRP_ID, INVT_PROJ.S_MRP_OPTION_CD as S_MRP_OPT
ITEM	Model Query	select ITEM.ACTIVE_FL as ACTIVE_FL, ITEM.BUYER_ID as BUYER_ID, ITEM.COMM_CD as COMM_CD, ITEM.COMPANY_ID as COMPANY_ID, ITEM.DFLT_UM_CD as DFLT_UM_CD, ITEM.HAZMAT_FL as HAZMAT_FL, ITEM.IN
ITEM_CST	Model Query	select ITEM_CST.ITEM_KEY as ITEM_KEY, ITEM_CST.S_ITEM_CST_TYPE as S_ITEM_CST_TYPE, ITEM_CST.MATL_CST_AMT as MATL_CST_AMT, ITEM_CST.MATL_BURD_CST_AMT as MATL_BURD_CST_AMT, ITEM_CST.LAB_CST_AMT
ITEM_PROJ_CST	Model Query	select ITEM_PROJ_CST.ITEM_KEY as ITEM_KEY, ITEM_PROJ_CST.PROJ_ID as PROJ_ID, ITEM_PROJ_CST.S_ITEM_CST_TYPE as S_ITEM_CST_TYPE, ITEM_PROJ_CST.MATL_CST_AMT as MATL_CST_AMT, ITEM_PROJ_CST.MATL_BURD
OPERATION	Model Query	Select *from
PART	Model Query	select PART.ABC_CLASSIF_CD as ABC_CLASSIF_CD, PART.ALWAYS_QT_FL as ALWAYS_QT_FL, PART.AS_REQD_FL as AS_REQD_FL, PART.ASY_CHNG_USER_ID as ASY_CHNG_USER_ID, PART.ASY_ENTR_DTT as ASY_ENTR_DTT,
PART_DOCUMENT	Model Query	select PART_DOCUMENT.PART_DOC_KEY as PART_DOC_KEY, PART_DOCUMENT.PART_KEY as PART_KEY, PART_DOCUMENT.PART_ID as PART_ID, PART_DOCUMENT.PART_RVSN_ID as PART_RVSN_ID, PART_DOCUMENT.DOCU
PLANT	Model Query	Select *from
PROJ	Model Query	select PROJ.ACCT_GRP_CD as ACCT_GRP_CD, PROJ.ACCT_GRP_FL as ACCT_GRP_FL, PROJ.ACTIVE_FL as ACTIVE_FL, PROJ.ALLOW_CHARGES_FL as ALLOW_CHARGES_FL, PROJ.BILL_PROJ_FL as BILL_PROJ_FL, PROJ.CAS_FL a
SERIAL_LOT	Model Query	select SERIAL_LOT.BOM_CONFIG_ID as BOM_CONFIG_ID, SERIAL_LOT.COMPANY_ID as COMPANY_ID, SERIAL_LOT.CUST_WARR_CD as CUST_WARR_CD, SERIAL_LOT.CUST_WARR_EXP_DT as CUST_WARR_EXP_DT, SERIAL_LOT.
STD_TEXT	Model Query	select STD_TEXT.TEXT_CD as TEXT_CD, STD_TEXT.TEXT_DESC as TEXT_DESC, STD_TEXT.TEXT_TX as TEXT_TX, STD_TEXT.S_HOW_USED_CD as S_HOW_USED_CD, STD_TEXT.MODIFIED_BY as MODIFIED_BY, STD_TEXT.TIME_ST
VEND	Model Query	select VEND.VEND_ID as VEND_ID, VEND.TERMS_DC as TERMS_DC, VEND.S_VEND_PO_CNTL_CD as S_VEND_PO_CNTL_CD, VEND.FOB_FLD as FOB_FLD, VEND.SHIP_VIA_FLD as SHIP_VIA_FLD, VEND.HOLD_PMT_FL as HO
WHSE	Model Query	Select *from
WORKCENTER	Model Query	Select *from
ORG	Model Query	Select *from
ORG - Owning	Model Query	Select *from
ALT_PART (BOM Component Part)	Model Query	Select *from
DOCUMENT_TEXT	Model Query	select DOCUMENT_TEXT.DOCUMENT_KEY as DOCUMENT_KEY, DOCUMENT_TEXT.TEXT_CD as TEXT_CD, DOCUMENT_TEXT.SEQ_NO as SEQ_NO, DOCUMENT_TEXT.MODIFIED_BY as MODIFIED_BY, DOCUMENT_TEXT.TIME_STAM
ENG_BOM for RPT_BOM_INDENT	Model Query	Select *from
ENG_BOM	Model Query	select ENG_BOM.ASY_PART_KEY as ASY_PART_KEY, ENG_BOM.BOM_LN_KEY as BOM_LN_KEY, ENG_BOM.ASY_PART_ID as ASY_PART_ID, ENG_BOM.ASY_PART_RVSN_ID as ASY_PART_RVSN_ID, ENG_BOM.COMP_BOM_CONFI
ENG_BOM_REF	Model Query	select ENG_BOM_REF.ASY_PART_KEY as ASY_PART_KEY, ENG_BOM_REF.BOM_LN_KEY as BOM_LN_KEY, ENG_BOM_REF.REF_DESIGNATOR_TX as REF_DESIGNATOR_TX, ENG_BOM_REF.MODIFIED_BY as MODIFIED_BY, ENG_BO
ENG_BOM_TEXT	Model Query	select ENG_BOM_TEXT.ASY_PART_KEY as ASY_PART_KEY, ENG_BOM_TEXT.BOM_LN_KEY as BOM_LN_KEY, ENG_BOM_TEXT.SEQ_NO as SEQ_NO, ENG_BOM_TEXT.ACTIVE_FL as ACTIVE_FL, ENG_BOM_TEXT.COMP_PART_KEY a
GL_CONFIG for BOM	Model Query	Select *from
ITEM_CST_Last	Model Query	with ITEM_CST_Last as (select * from [COSTPOINT].ITEM_CST where ITEM_CST.S_ITEM_CST_TYPE = 'L') select ITEM_CST_Last.ITEM_KEY as ITEM_KEY, ITEM_CST_Last.S_ITEM_CST_TYPE as S_ITEM_CST_TYPE, ITEM_CS
ITEM_CST_Reference	Model Query	with ITEM_CST_Reference as (select * from [COSTPOINT].ITEM_CST where ITEM_CST.S_ITEM_CST_TYPE = 'R') select ITEM_CST_Reference.ITEM_KEY as ITEM_KEY, ITEM_CST_Reference.S_ITEM_CST_TYPE as S_ITEM_CS
ITEM_CST_Standard	Model Query	with ITEM_CST_Standard as (select * from [COSTPOINT].ITEM_CST where ITEM_CST.S_ITEM_CST_TYPE = 'S') select ITEM_CST_Standard.ITEM_KEY as ITEM_KEY, ITEM_CST_Standard.S_ITEM_CST_TYPE as S_ITEM_CS
ITEM (BOM Component Part)	Model Query	Select *from
PART (BOM Component Part)	Model Query	Select *from
MAINT_GRP	Model Query	Select *from
MAINT_GRP_USER	Model Query	Select *from
MFG_MBOM for RPT_BOM_INDENT	Model Query	select MFG_BOM_for_Rpt_Bom_Indent.ASY_PART_KEY as ASY_PART_KEY, MFG_BOM_for_Rpt_Bom_Indent.BOM_LN_KEY as BOM_LN_KEY, MFG_BOM_for_Rpt_Bom_Indent.ASY_PART_ID as ASY_PART_ID, MFG_BOM_for_Rpt_B
MFG_BOM	Model Query	select MFG_BOM.ASY_PART_ID as ASY_PART_ID, MFG_BOM.ASY_PART_KEY as ASY_PART_KEY, MFG_BOM.ASY_PART
MFG_BOM_REF	Model Query	select MFG_BOM_REF.ASY_PART_KEY as ASY_PART_KEY, MFG_BOM_REF.BOM_LN_KEY as BOM_LN_KEY, MFG_BOM
MFG_BOM_TEXT	Model Query	select MFG_BOM_TEXT.ACTIVE_FL as ACTIVE_FL, MFG_BOM_TEXT.ASY_PART_KEY as ASY_PART_KEY, MFG_BOM_TEX
RPT_BOM_INDENT	Model Query	select RPT_BOM_INDENT.ASY_PART_KEY as ASY_PART_KEY, RPT_BOM_INDENT.ASY_PROV_PART_FL as ASY_PROV_PART

Temp Relationships Detailed Structure Structure Table Usage General Info

Ready

Use model spreadsheets to see details about a framework model.

The model spreadsheet includes tabs that provide the structure of a model, its relationships, and the tables used in the model.

### 3a. Framework Model Documentation





# Hello. Welcome to Costpoint Business Intelligence.

Unearth hidden insights  
experience driven by AI.



How-to catalog

Up to this point, we've covered the packages in CBI and their row security. Next, you will see where to open a package and view its contents.

Home

Search

My content

Team content

Company content

Recent

Team content &gt; \*Packages\*



~Legacy Packages (CER 7.1.x)~  
3/30/2020 11:42 AM

Accounts Payable  
6/24/2020 6:29 AM

Accounts Receivable  
6/22/2020 7:42 AM

Contracts Reporting  
6/17/2020 4:03 AM

General Ledger  
6/22/2020 8:08 AM

Manufacturing  
7/13/2020 12:55 AM

Materials  
6/17/2020 5:47 AM

Procurement  
7/15/2020 4:54 AM

Project Analysis  
6/22/2020 6:31 AM

Project Planning Analysis  
6/26/2020 2:47 AM

Project Planning Reporting  
7/21/2020 9:39 AM

Project Reporting  
7/6/2020 5:52 AM

Time  
4/30/2020 12:07 PM

Our secured packages are located in a separate folder in **Team content » Packages**. Placing the packages in this area is helpful for setting up security permissions.

Show welcome

Home

Search

My content

Team content

Company content

Recent

Team content > \*Packages\*

~Legacy Packages (CER 7.1.x)~ 3/30/2020 11:42 AM
Accounts Payable 6/24/2020 6:29 AM
Accounts Receivable 6/22/2020 7:42 AM
Contracts Reporting 6/17/2020 4:03 AM
General Ledger 6/22/2020 8:08 AM
Manufacturing 7/13/2020 12:55 AM
Materials 6/17/2020 5:47 AM
Procurement 7/15/2020 4:54 AM
Project Analysis 6/22/2020 6:31 AM
Project Planning Analysis 6/26/2020 2:47 AM
Project Planning Reporting 7/21/2020 9:39 AM
Project Reporting 7/6/2020 5:52 AM
Time 4/30/2020 12:07 PM

point

analytics

Our older packages are all contained in the **Legacy Packages** subfolder under Packages, so that you can easily distinguish them from the newer packages.

Row security does not apply to legacy packages.

Deltek

Welcome

Home

Search

My content

**Team content**

Company content

Recent

Manage

New

Team content

- \*Packages\* 5/13/2020 7:49 AM
- Accounts Payable 7/13/2020 5:18 AM
- Accounts Receivable 3/2/2020 3:09 AM
- Calendars
- Contracts 7/15/2020 4:05 AM
- Costpoint Enterprise Reporting 10/1/2018 3:59 PM
- Costpoint Enterprise Reporting for Budgeting and Planning 10/1/2018 10:11 PM
- Costpoint Enterprise Reporting for Costpoint Administration 2/16/2016 2:08 PM
- Costpoint Enterprise Reporting for Fixed Assets 2/11/2015 12:45 PM
- Costpoint Enterprise Reporting for HR and Payroll 10/1/2018 9:54 PM
- Costpoint Enterprise Reporting for Project Manufacturing 10/1/2018 9:55 PM
- Execu 5/1/20
- Gener 5/13/20

Click **Team content**.

Click **Packages**.

You can also open a new report from the **New** menu.

Show welcome

analytics

To see an example of a package, follow the steps to open a new report.

4. Open a Package > Steps A and B

- Home
- Search
- My content
- Team content**
- Company content
- Recent
- Manage

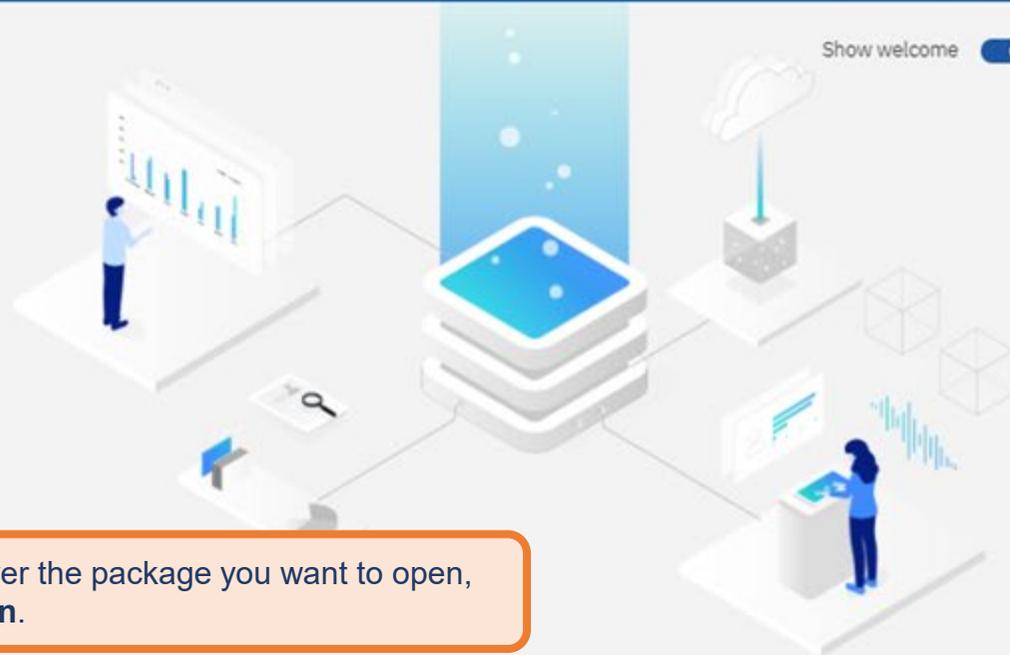
- Team content > \*Packages\*
- ~Legacy Packages (CER 7.1.x)~  
3/30/2020 11:42 AM
  - Accounts Payable  
6/24/2020 6:29 AM
  - Accounts Receivable  
6/22/2020 7:42 AM
  - Contracts Reporting  
6/17/2020 4:03 AM
  - General Ledger  
6/22/2020 8:08 AM
  - Manufacturing**  
7/13/2020 12:55 AM
  - Materials  
6/17/2020 5:47 AM
  - Procurement  
7/15/2020 4:54 AM
  - Project Analysis  
6/22/2020 6:31 AM
  - Project Planning Analysis  
6/26/2020 2:47 AM
  - Project Planning Reporting  
7/21/2020 9:39 AM
  - Project Reporting  
7/6/2020 5:52 AM
  - Time  
4/30/2020 12:07 PM



analytics

Hover the mouse pointer over the package you want to open, and then click the **More icon**.

point



Home

Search

My content

**Team content**

Company content

Recent

- Team content > \*Packages\*
- ~Legacy Packages (CER 7.1.x)~  
3/30/2020 11:42 AM
  - Accounts Payable  
6/24/2020 6:29 AM
  - Accounts Receivable  
6/22/2020 7:42 AM
  - Contracts Reporting  
6/17/2020 4:03 AM
  - General Ledger  
6/22/2020 8:08 AM
  - Manufacturing**  
7/13/2020 12:55 AM
  - Materials  
6/17/2020 5:47 AM
  - Procurement  
7/15/2020 4:54 AM
  - Project Analysis  
6/22/2020 6:31 AM
  - Project Planning Analysis  
6/26/2020 2:47 AM
  - Project Planning Reporting  
7/21/2020 9:39 AM
  - Project Reporting  
7/6/2020 5:52 AM
  - Time  
4/30/2020 12:07 PM

- Create report**
- Create exploration
- Create dashboard
- Create data module
- Create data set
- Share
- Copy
- Create shortcut
- Properties

D

Click **Create report**.

**Note:** To access this menu, you must have the proper authoring capabilities. If you only have the access to view reports, you will only be able to view the packages in this folder that are associated with the domains you have access to.

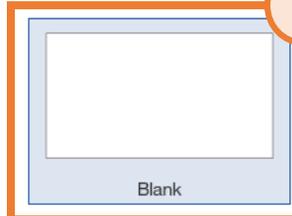


## Templates and themes

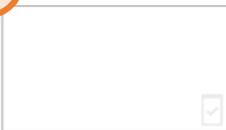
Templates Themes

Select a report template.

E



Blank



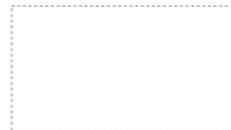
Blank active report



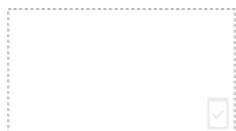
1 beside 2



1 beside 2 active report



1 column



1 column active report



2 by 2



2 by 2 active report



2 by 3



2 by 3 active report



2 column active report



2 columns



2 over 1



2 over 1 active report



2 row active report

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

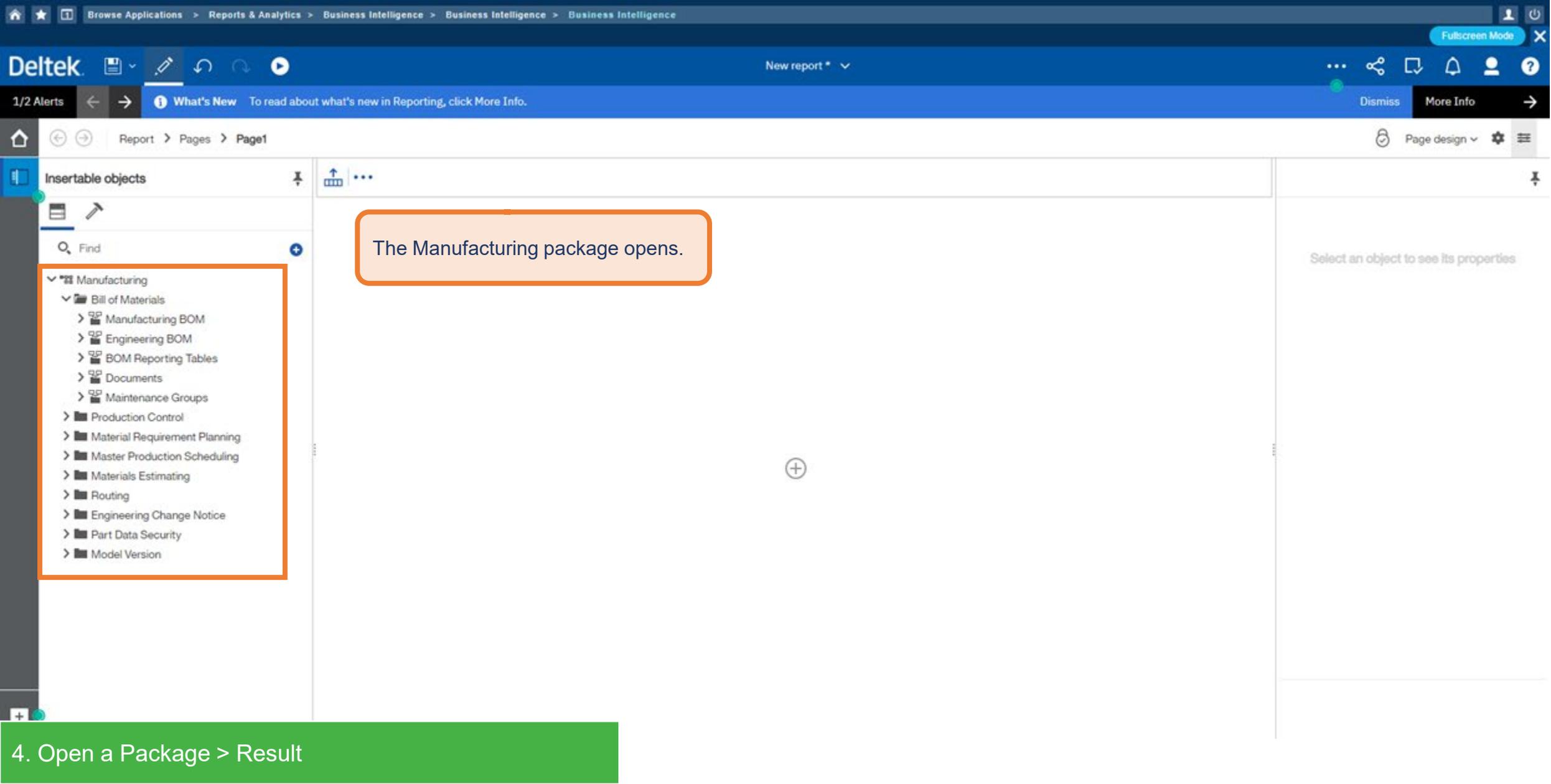
Template:  
Theme:

And then click OK.

F

OK

Cancel



The Manufacturing package opens.

4. Open a Package > Result

As you can see, the different parts of a package are designed to make it easy for you to create reports, especially those that display as lists.

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

These are query subjects, which are basic building block sets of query items that have an inherent relationship. Query subjects are the equivalent of a table in a database.

Once you expand the package to the lowest level, you will see columns in your query subject that you can drag and drop into the report.

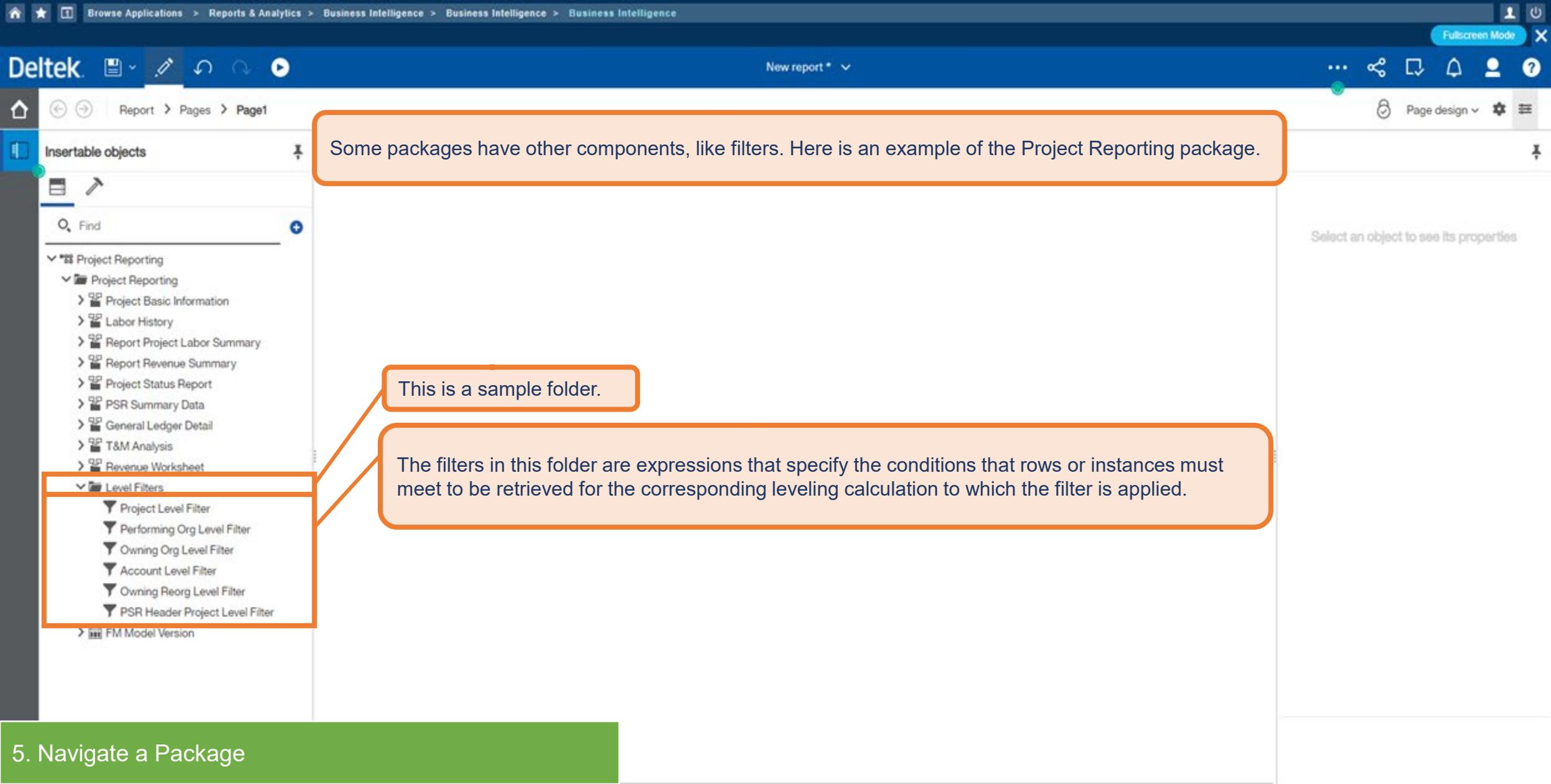
Hover your mouse pointer over a column to see a screen tip with the column's table name and column name from the Costpoint database.

Insertable objects

Find

- Manufacturing
  - Bill of Materials
    - Manufacturing BOM
      - Manufacturing BOM
      - Manufacturing BOM Reference
      - Manufacturing BOM Text
      - Company
    - Item
      - Item ID
      - Item Description
      - Active Flag (Y/N)
      - Buyer ID
      - Buyer ID name
      - Company ID
      - Default Unit of Measure Code
      - Item Type
      - Hazardous Material Flag (Y/N)
      - Allow Overshipment Flag (Y/N)
      - Inspection Type
      - Total Lead-time Days

CP.EMPLLAST\_FIRST\_NAME



Some packages have other components, like filters. Here is an example of the Project Reporting package.

This is a sample folder.

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.



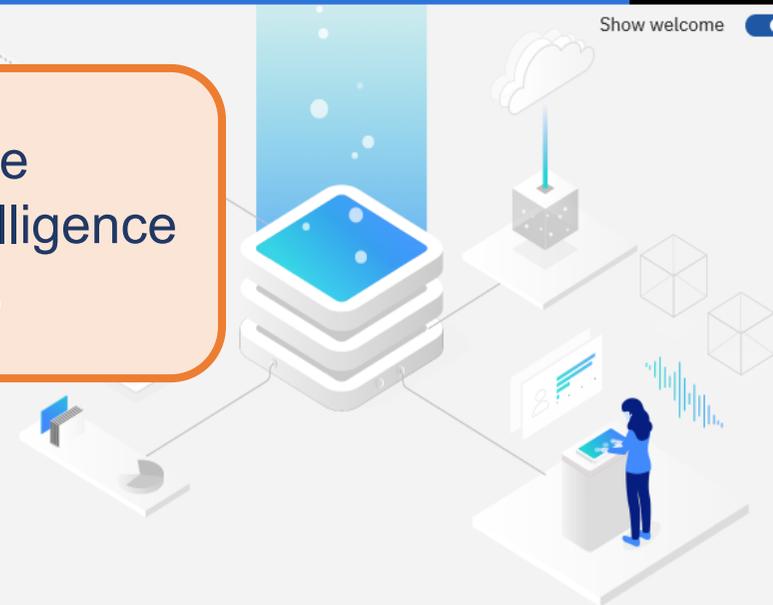
- Home
- Search
- My content
- Team content
- Recent
- Manage
- New



# Hello. Welcome to Costpoint Business Intelligence.

Unearth hidden insights with a personalized analytics experience driven by AI.

This concludes the Costpoint Business Intelligence Model Overview.



## How-to catalog

Watch short videos to learn how to use Cognos Analytics and start gaining insights into your data.