



Costpoint Enterprise Reporting Administrator Series: Cloud Setup (Light Usage Customers) - Checklist

The following are the steps to set up Costpoint Enterprise Reporting in the Cloud.

Step	Description	Who	Customer Tasks	Status	Notes
1	Customer receives notification from Deltek of upcoming upgrade to CER 7.2	Customer SaaS Administrator	<ul style="list-style-type: none"> Sign up for Kick-off Session Review Costpoint Enterprise Reporting Overview Click Guide 	<input type="checkbox"/>	
2	Attend Kickoff Meeting	CER Administrator, Report Authors	<ul style="list-style-type: none"> Sign up for Security Setup Review (pre-upgrade) Sign up for Post Upgrade Content Configuration Session 	<input type="checkbox"/>	
3	Setup users in CP groups	Administrator	<ul style="list-style-type: none"> DLZ : Security Setup - Self Paced Learning Complete User Spreadsheet Set up Users in Costpoint 	<input type="checkbox"/>	
4	Security Setup Review Meeting	CER Admin, Deltek Upgrade Analyst	Finalize User Setup	<input type="checkbox"/>	
5	CER switched to CER 7.2 Series	Deltek	CER Administrator tests access to CER 7.2 Series	<input type="checkbox"/>	
6	Training Users on CER 7.2 Series	All Users	DLZ: CER 7.2 Navigation, Reports, Notifications and Modify Reports - Self-paced Learning	<input type="checkbox"/>	
7	Review training: Model Overview	Report Authors	DLZ: CER 7.2 Series Models Overview - Clickguide	<input type="checkbox"/>	
8	Post Upgrade Content Configuration Meeting	CER Admin, Deltek Upgrade Analyst		<input type="checkbox"/>	
9	Post Upgrade Q&A - 2 week period	CER Admin	If needed, email Upgrade Analyst with questions/	<input type="checkbox"/>	
Post Upgrade Training					
1	Learn how to add folders, grant security.	Admin, Key Users	DLZ:CER 7.2 Series Managing Company Content - Clickguide	<input type="checkbox"/>	
2	Review Dashboard Training	All Users	DLZ CER 7.2 Series Dashboards - Self-Paced Learning	<input type="checkbox"/>	
3	Author Class-Basic/Advanced (DLZ Only)	Key Users	DLZ Paid area Only - Virtual Live Classroom and Recordings Training and workflow.	<input type="checkbox"/>	