

# Introducing Ask Dela - Your Digital Assistant in Costpoint



**Ask Dela**, the Deltek Digital Assistant in Costpoint, makes it easy to get the information you need through simple text or voice conversations. Whether you're looking for quick data or detailed summaries on contracts and projects, Ask Dela is here to help. You can even manage your timesheet with easy text commands. With a focus on user-friendly design, Ask Dela lets you manage responses effortlessly and keeps your chat history private and secure.

## > Enabling Ask Dela

Enable Dela for Costpoint to activate features like Ask Dela, Smart Summary, and add Dela support to the Costpoint MS Teams App.

### To enable Dela:

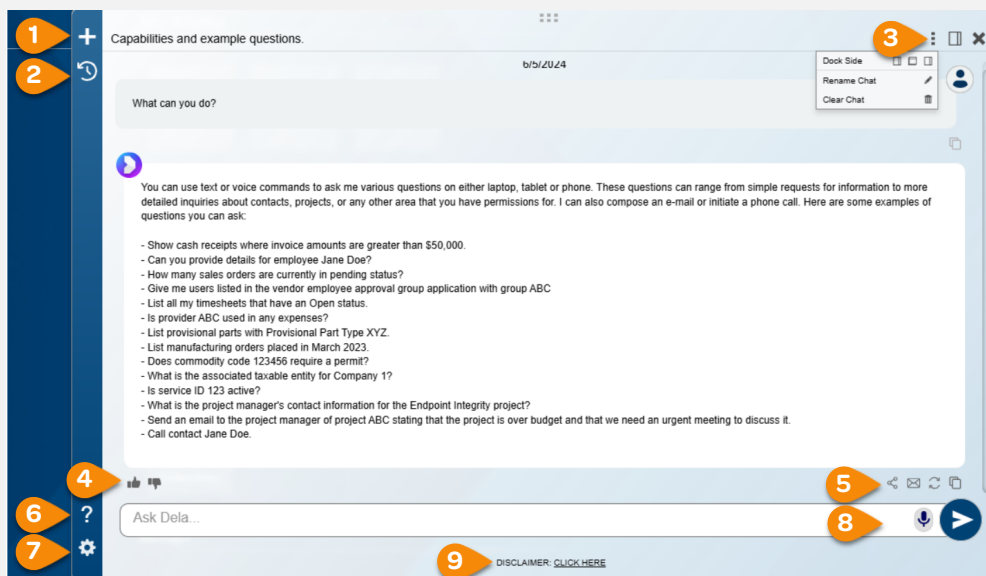
1. Open the **Configure System Settings** application.  
Access: **Admin > System Administration > System Administration Controls > Configure System Settings**
2. On the **General Settings** tab in Corporate Settings, select **Enable Dela**.

## > Get Started with Ask Dela

To start using Ask Dela, just click its icon **D** on the Navigation Toolbar or at the corner of your screen.

You can personalize your chat window in the **Screen Configuration Panel**, making it as big or small as you like, or even focus on it in full-size mode for those bigger tasks. It's all about making your workday smoother and more efficient.

## > Exploring the Ask Dela Chat Window



- 1 Start a new conversation.
- 2 Open chat history.
- 3 Change the chat window position, rename the automatically-generated subject titles, or delete the conversation.
- 4 Like or dislike responses to provide feedback.
- 5 Share, email, refresh, and copy responses.
- 6 Ask Dela to show sample questions you can ask.
- 7 Open settings to change the Ask Dela icon location and font size.
- 8 Use your voice to communicate with Ask Dela.
- 9 Show the legal disclaimer.

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## > Interacting with Ask Dela

Ask your initial question about a specific subject, like a project or person.

Who is the project manager for the Endpoint Integrity project?

Sarah Jones is the project manager for the Endpoint Integrity project.

The assistant will answer your question and remember the subject for your follow-up questions.

In your next questions, you can refer back to the subject using pronouns or simply ask related questions without needing to repeat the entire name.

What is their contact information?

Ask Dela is designed to understand the flow of your conversation and remember the subject of your questions.

### Reduced Repetition

Ask Dela remembers your initial question's subject, so you don't have to repeat it. Enjoy faster, more efficient interactions without the redundancy.

### Smoother Interactions

Ask Dela's conversational context makes interactions feel like chatting with a colleague, allowing for a natural, intuitive flow without needing to repeat details.

## > Tips for Effective Communication with Ask Dela



**Be Specific:** Ask clear, detailed questions about individual records for precise answers.



**Provide Context:** Include record names, IDs, or other identifiers for accurate information retrieval.



**Structure Prompts Logically:** Organize prompts logically and keep them relevant and concise.



**Use Proper Terms:** Use the actual field names in Costpoint for clarity.



**Verify Responses:** Always double-check responses for critical data, as errors can occur.



**Recognize Limits:** Understand that Ask Dela may not handle complex calculations or advanced queries.



**Check Data Access:** Make sure you have the right permissions for the data you're asking about.



**Use Appropriately:** Limit questions to record and project inquiries.



**Maintain Context:** Reset the conversation context when necessary for relevant responses.



**Adapt Prompts:** Adjust your prompts based on past interactions for better results.



**Experiment:** Try different styles of prompts to find what works best.



**Report Issues:** Contact Deltek Support Services for persistent inaccuracies.



**Clear Conversation History:** If Ask Dela's responses become irrelevant, clear the conversation history or rephrase your question to reset the context. Remember, Ask Dela retains the context of the last two interactions, including questions, answers, and specific records.

## > Current Limitations

- **Aggregate Data Queries:** Ask Dela cannot process aggregate data requests, such as top projects by revenue, but can handle some aggregate-type activity data within a specific timeframe.
- **Project Summary and Hub Data:** Information is limited to WBS1 in project summaries and hub data; WBS2/3 data, and specific phase or task financials are not queryable.
- **Conversation Scope:** Ask Dela supports single record conversations; when off-record, the specific record must be identified.
- **Conversation History Retention:** Ask Dela remembers the context of only the last two questions, so earlier interactions may not be retained.
- **Language Support:** Currently, only US English is supported; other languages may work but are not officially supported.
- **Supported Data Tables and Fields:** Some data tables and fields, including file grids, link grids, user-defined hubs, grids, and fields, are not supported.
- **'How To' Inquiries:** Ask Dela cannot respond to 'how-to' questions and will indicate the lack of access to Costpoint Help for such queries.

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## > Frequently Asked Questions

### Is Dela the same as the AI Assistant?

Dela is the brand or name that describes all of Deltek's AI offerings. The Costpoint AI Assistant, now named Ask Dela, falls under the Dela brand. Smart Summaries, which use AI technology, is also a part of Dela.

### Do I get Dela with my Costpoint License?

Yes, Dela is included with the Costpoint License. On-premise customers need to have a license with Azure Chat GPT 4 Turbo / GPT 4o.

### Is Dela opt-in?

Dela is available starting with Costpoint 8.2.8. Costpoint administrators can enable Dela for their users.

### Is Dela enabled for Cloud Customers? How do we enable/disable Dela?

Yes, Dela is available to all Costpoint Cloud customers, and a Costpoint Administrator can enable or disable Dela for each Costpoint system.

### Do I need BI (Cognos) to utilize Dela?

No, you do not need BI (Cognos) to utilize Dela. Also, no other technical components are required except for on-premise customers who will need to have a license with Azure Chat GPT 4 Turbo / GPT 4o.

### Is there any additional connectivity that has to be set for AI to be available?

For Cloud customers, Dela is available immediately. On-premise customers must obtain their own license with Microsoft to provide a product key for their Azure Chat GPT 4 Turbo / GPT 4o offering.

### How do you access Dela?

Dela is a term used to describe the overall AI capabilities found in Costpoint. Costpoint utilizes Dela (AI) in several areas, including Ask Dela, which is the AI Digital Assistant, and Smart Summaries, found in the Contracts module. Ask Dela can also be used with the Costpoint MS Teams App to enhance your experience working with the MS Teams App.

### Is Dela available anywhere in Costpoint or only with the Dashboard?

Dela is how we refer to all of Costpoint's AI functionality. Ask Dela, the Costpoint digital assistant is available anywhere in Costpoint and Smart Summaries, also a part of Dela, is available in the Contracts module.

### Can we choose who has access to Dela?

No, Dela can be enabled or disabled at the organization level. Dela inherits user organization and security permissions, so users can only ask Dela questions related to the information they already have access to.

### Will Dela restrict the information it reveals based on what employees have access to?

#### Also, just to confirm, it does not work with org security?

Yes, Dela adheres to the same data permissions that the Costpoint user is subject to based on their settings in the Costpoint system they are working in. For example, if I do not have access to salary information based on my Costpoint permission, Dela will not provide me with that information. Dela does work with org security. Dela inherits user organization and security permissions, so users can only ask Dela questions related to the information they already have access to.

### Is there a training on the AI functionality within Costpoint?

A pre-recorded training on the Dela capabilities is forthcoming. Training for the MS Teams app also overlaps with Dela functionality.

### Does Dela support UDFs/Extensions?

Ask Dela, the Costpoint Assistant, will support Extensions. It operates within the application using the same mechanism as a regular user. If the application offers extensibility for the selected user, Ask Dela will utilize it. However, since each extensibility feature can be unique, while we generally support them, we cannot guarantee the response will always be as expected.

### Are there any performance issues with users using Dela?

Dela acts as another user in Costpoint, and we do not expect any performance issues outside of regular usage.

## > Notes

- For privacy and security purposes, Ask Dela does not store any questions or answers in locations outside your individual browser.

Deltek cannot restore a chat history or otherwise access it. Instead, either administrators can enable the clearing of Dela chat history on logout or individuals can choose to clear their history within their browser.

- Dela leverages the OpenAI GPT Turbo Model through Microsoft Azure services. 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 Dela. Deltek is working closely with Microsoft to overcome these limitations.

- **Costpoint On-Premise Customers:**

Dela utilizes the OpenAI GPT-4 Turbo or OpenAI GPT-4o models available through Microsoft Azure services. To access these AI capabilities within Costpoint, you must have a separate agreement with Microsoft. This agreement will include a license key that must be obtained and integrated into the Costpoint configuration.

# Introducing Ask Dela - Your Digital Assistant in Costpoint



## > Ask Dela and MS Teams Integration



Ask Dela can be integrated into MS Teams through the **Costpoint MS Teams App**. Ask questions in MS Teams and receive the same responses as you would from the Ask Dela digital assistant in Costpoint.

This functionality extends to inquiries about projects, people, parts, vouchers, and more. Any questions that work with Ask Dela inside the Costpoint UI will also work with the Costpoint MS Teams app.

## > Setting up

### 1 Setup the bot service for MS Teams

MS Teams must be configured first in the **Product Configuration Utility** screen\*.

### 2 Add details in the Microsoft Teams Bot Connection Information subtask in Costpoint\*

- Open **Manage System Integration Accounts**.

(Access: **Admin > Security > System Security > Manage System Integration Accounts**)

- Open the **Microsoft Teams Bot Connection Information** subtask.
- Enter the tenant ID, application ID, secret, and configuration endpoint information that was established in the Product Configuration Utility.
- Save your updates.
- Open MS Teams and add the **Costpoint MS Teams App**.

**Note:** To use MS Teams, users must have an email address assigned to their account in **Manage Users**. If users share the same email address in Costpoint, MS Teams will prompt a user to specify which one is using the Costpoint MS Teams app to establish a temporary link.

Costpoint uses the SSO process to authenticate a user in Costpoint based on their identity in MS Teams, as established by Microsoft.

\* See **Appendix H, I** in the **Deltek Costpoint 8.2 Configuration Utility Guide** for detailed setup instructions.

**Note:** The Costpoint MS Teams App can also be adjusted to work solely as a notification channel. This restricts the use of Dela to the Costpoint UI.

To do this, select the **Disable Dela for MS Team Integration** setting on the **Dela** tab in **Configure System Settings**.

Access: **Admin > System Administration > System Administration Controls > Configure System Settings > Corporate Settings > Dela tab**

## > Why set up MS Teams Integration?



### Notifications

The integration of MS Teams offers a new notification method, allowing you to receive alerts just like you would through email, device notifications, and SMS.

Customize the types of notifications that you receive via MS Teams in the **Configure System Settings** and **Configure User Preferences** screens, to ensure that you only get the information that is relevant to you.



### Interactive Messages

The interactive email cards available in Costpoint 8.2 for approval workflows and timesheet management are supported in MS Teams.

Save time by using the Dela integration and invoking these cards directly from MS Teams.

Here are some commands for interacting with Costpoint via Dela:

- **"Enter time"**  
or variations of this command to enter your timesheet.
- **"Sign timesheet"**  
or similar commands to sign your timesheet.
- **"Show my timesheet"**  
or related commands to display your timesheet.
- **"Show my approval tasks"**  
or similar commands to view your approval tasks.