

Dela for Costpoint FAQs

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29 March 2026



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Contents

Dela For Costpoint FAQs 1

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Dela for Costpoint FAQ

This FAQ document helps answer your questions about Dela, including specific capabilities and security considerations, and what this means for you as a Costpoint customer.

Terminology

Deltek Dela

[Dela](#) is an AI-Powered Business Companion that encompasses all of Deltek's AI features within our product suite. These purposeful innovation features are built to revolutionize product delivery by enabling intelligent exploration, generating and automating smart content, and predicting project and organization success.

Dela is not just a single product but a suite of AI-embedded technologies that power Deltek's industry-specific solutions. Available within select Deltek solutions today and with future releases, customers can leverage Dela in multiple ways to generate smart content, predict project performance and find information more efficiently.

Ask Dela

Ask Dela is the AI Digital Assistant within Costpoint. *Ask Dela* uses natural language to enhance productivity and efficiency by finding information, performing tasks and engaging users. It allows end-users to ask questions and receive answers about data available in Costpoint. Government contractors can request *Ask Dela* to draft emails, conduct risk assessments, or display pending sales orders and open timesheets, all in one place. Also accessible from within Microsoft Teams, users can leverage *Ask Dela* to chat about Costpoint data, enter time, sign timesheets, approve workflows and submit expenses directly within the application where they spend much of their work hours.

Ask Dela can be accessed both from within the Costpoint application and from within the Costpoint MS Teams App.

Costpoint MS Teams App

The Costpoint MS Teams App seamlessly integrates Costpoint with MS Teams, enabling you to receive notifications, enter time, approve expenses and workflows, and use Ask Dela. Check out the FAQ section below for more details.

Smart Summaries™

Dela enables [Smart Summaries in Deltek Costpoint](#) to cut down on the time it takes to gather basic information, including contract and customer names, key financial metrics, period of performance and subcontractor data.

Interactive Emails

Interactive Emails are sent via email, allowing users to enter, submit, and approve time directly from Outlook. They can also be used for approving expense reports and workflows.

Interactive Messages

Interactive Messages are messages that are sent to users in Teams, leveraging the same functionality as Interactive Emails. Interactive Messages allow users the ability to enter, submit and approve time and approve workflows (including expenses) in the MS Teams app.

FAQs

What technology is included within the Dela umbrella?

- Artificial Intelligence (AI): Utilizes complex algorithms to analyze data, recognize patterns, and make decisions or recommendations without human intervention.
- Machine Learning (ML): ML is a form of AI that uses data to train models, allowing the system to predict outcomes and improve its performance over time based on experience.
- Natural Language Processing (NLP): NLP allows computers to understand and respond to human language, making it possible to interact with systems through speech or text naturally.
- Generative AI (GenAI): Generative AI can create new content, such as text, images, or designs, by learning from existing data and applying that knowledge to produce original outputs.

Is Dela available to all Costpoint customers?

- Dela capabilities were introduced to on-premises and GCC Costpoint customers in early 2024 with the release of 8.2.8. and leverages the Microsoft Azure Commercial Cloud deployment of OpenAI.
- Dela capabilities were introduced to Costpoint GCCM customers with the release of 8.2.15 in November 2024, and leverages Microsoft Azure Government Cloud High (GCC-High) deployment of OpenAI.
- Dela's capabilities in Costpoint are all currently embedded in the existing product and are included as part of the license fee. Costpoint on-premises customers using version 8.2.14 or below must sign their own agreement with Microsoft to obtain their own key. On-premises customers with Costpoint version 8.2.15 or higher already have Dela included but still have the option to utilize the "bring your own key" model.
- On-premises customers who wish to utilize AI services in the Azure Government Cloud (GCC High) have this capability but need to use the "bring your own key" model.

In the future, there may be circumstances where a Dela capability is for sale on its own.

Do I have to use Dela since it's part of Costpoint?

- No, Costpoint users have the option to enable Dela capabilities in their Costpoint solution. A designated admin at your company must enable or disable Dela. To change settings, go to **Admin » Configure System**

Settings » Corporate Settings, and select Enable Dela.

I'm interested in using AI but concerned about the risks.

- We understand that incorporating artificial intelligence presents questions for your business, especially when working for the government. At Deltek, we take privacy, security, and compliance seriously---and this includes the ethical and responsible development of AI features under Dela. We have shared more about our approach to [Responsible AI on Deltek.com](#), and in this [Costpoint Product Blog](#). If you have further concerns, please don't hesitate to reach out to your Customer Success Manager.

How will I know when I'm using Dela?

- The Dela icon  will be visible within your Deltek solution to let you know when Dela is powering your projects.

Can I use the Digital Assistant within Costpoint without enabling Dela?

- No. Ask Dela requires that your firm enable AI capabilities from Dela.

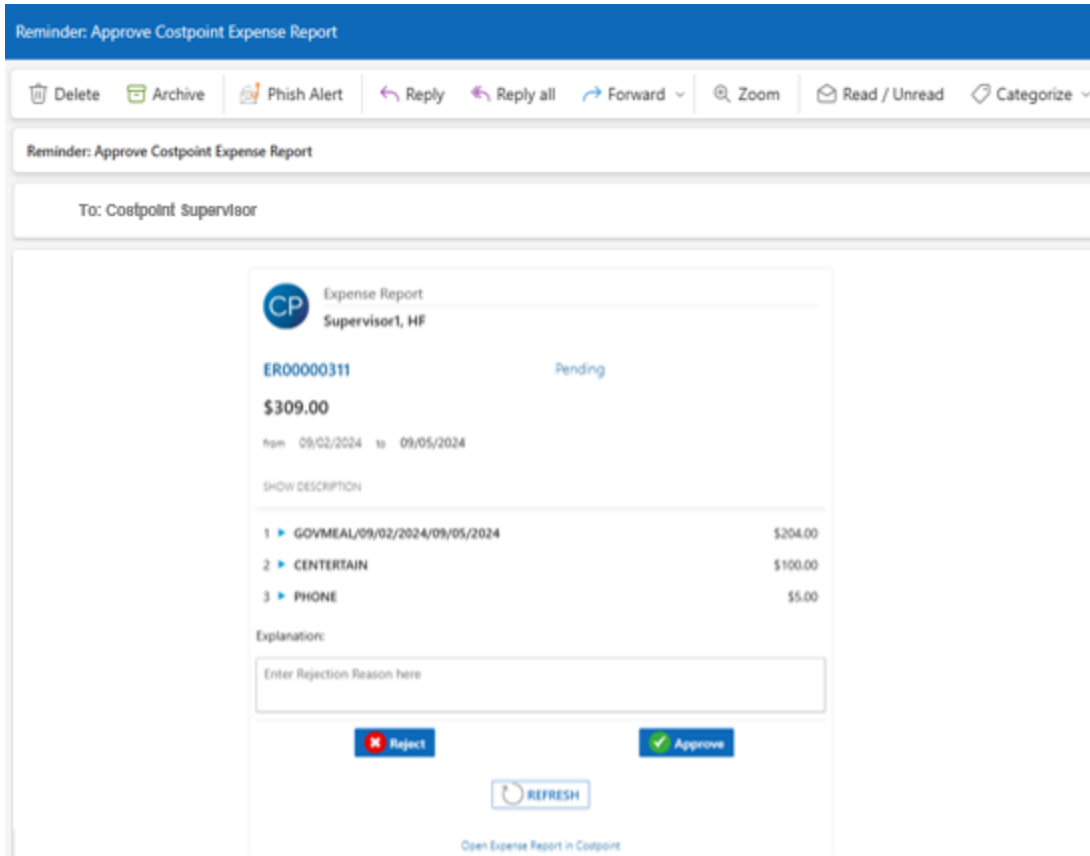
Can I create Smart Summaries without enabling Dela?

- No. Smart Summaries require that your firm enable AI capabilities from Dela.

Can I submit/approve time and approve expenses via Outlook without enabling Dela?

Beginning with 8.2, users have had the option to utilize Interactive Emails for timesheet reminders and workflow approvals, which are sent directly to a user's Outlook. Users can use the Interactive Email reminders to enter and submit their timesheets and approve workflows. Managers can then approve or reject timesheets directly from their inbox via the email notification they receive once a direct report submits their timesheet.

In Fall 2024 (8.2.15), we released Expense Report approval via Interactive Emails, allowing managers to approve expense reports directly from Outlook.



The new Interactive Email tab in Configure System Settings includes settings to enable interactive email notifications for Time & Expense, the approval workflow, and the requisition approval workflow. This functionality does not use AI and is configured separately from Dela. Learn how to set up Interactive Emails in the [CIC](#) or [CCIC](#).

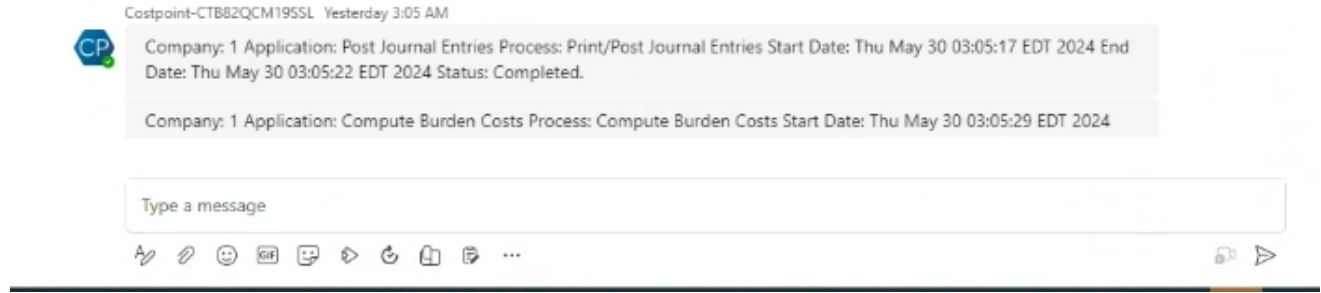
Can I use the Costpoint MS Teams app without enabling Dela?

Yes, the Costpoint MS Teams App can be used independently without enabling Dela. The Costpoint MS Teams App is an application that allows customers to integrate Costpoint with Microsoft Teams so you can receive notifications from Costpoint, including project updates. By enabling additional capabilities, including Dela and/or Interactive Messaging, you gain additional functionality to chat with your digital assistant, Ask Dela, or submit/approve time and approve expenses.

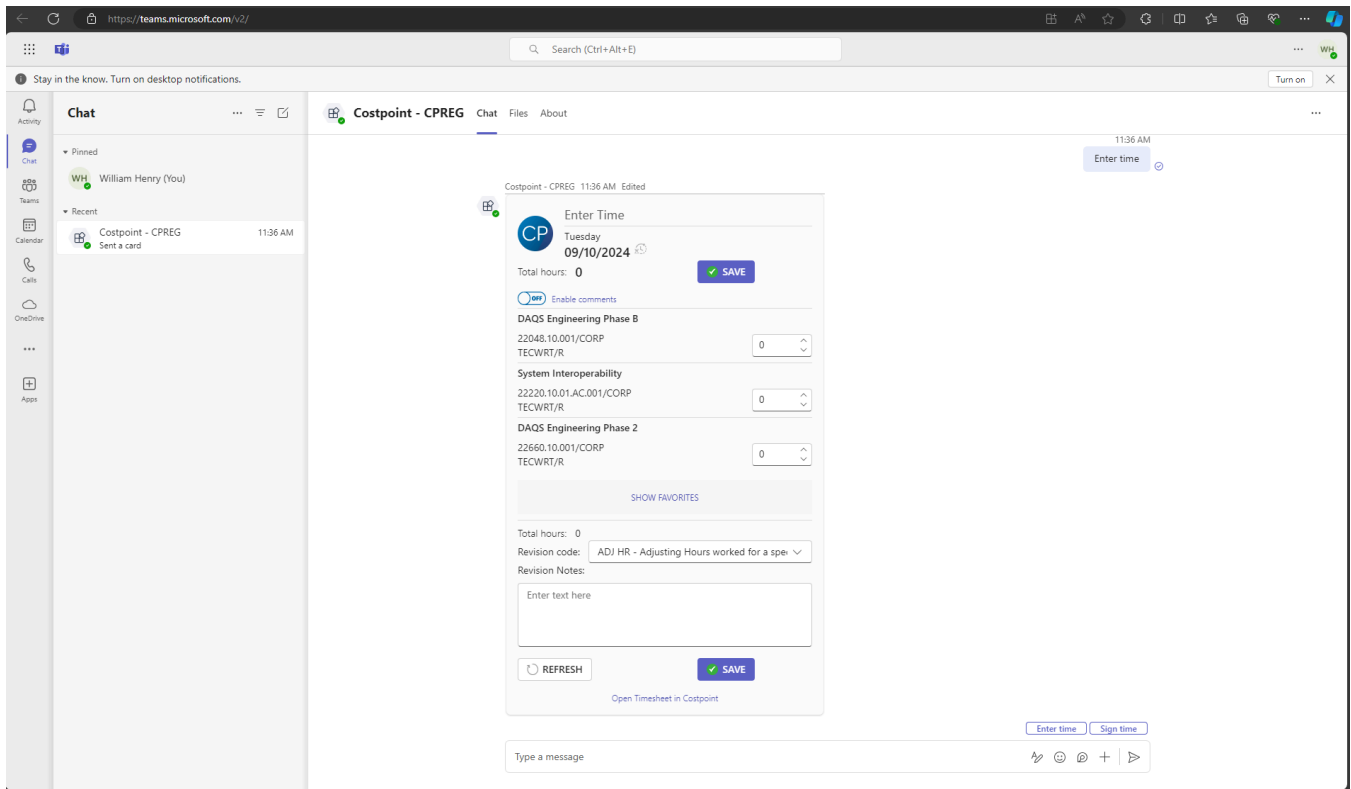
Here is everything the Costpoint MS Teams App enables you to do:

- **Receive notifications:** You can now use MS Teams to receive various notifications, just as you would through email, device notifications, and SMS. This notification option can be set up in the Configure System Settings and Configure User Preferences screens, with the ability to use default and override options for specific message categories. This means you can customize the types of notifications you receive via MS Teams,

ensuring that you get only the information that is relevant to you.



- **Use Interactive Cards:** The Adaptive Cards technology, which powers our Interactive Email capabilities, is now supported in MS Teams. This allows users to enter, submit, and approve time directly from Teams using Interactive Messages, and approve workflows and expenses.



This capability allows access to our **Quick Action** buttons for basic commands, as well, including:

- "Enter time" or variations of this command to enter your timesheet.
- "Sign timesheet" or similar commands to sign your timesheet.

,054

(This amount appears to be negative, which may indicate a credit or an error in the data.)

are only two approved invoices with a due amount listed in the system. If you need more information or please let me know.

12:45 PM

enter 4 hours to project 22048.10.001 for Wednesday, September 11

successfully charged to project 22048.10.001 for Wednesday, September 11, 2024. If you need more information, please let me know!

New topic

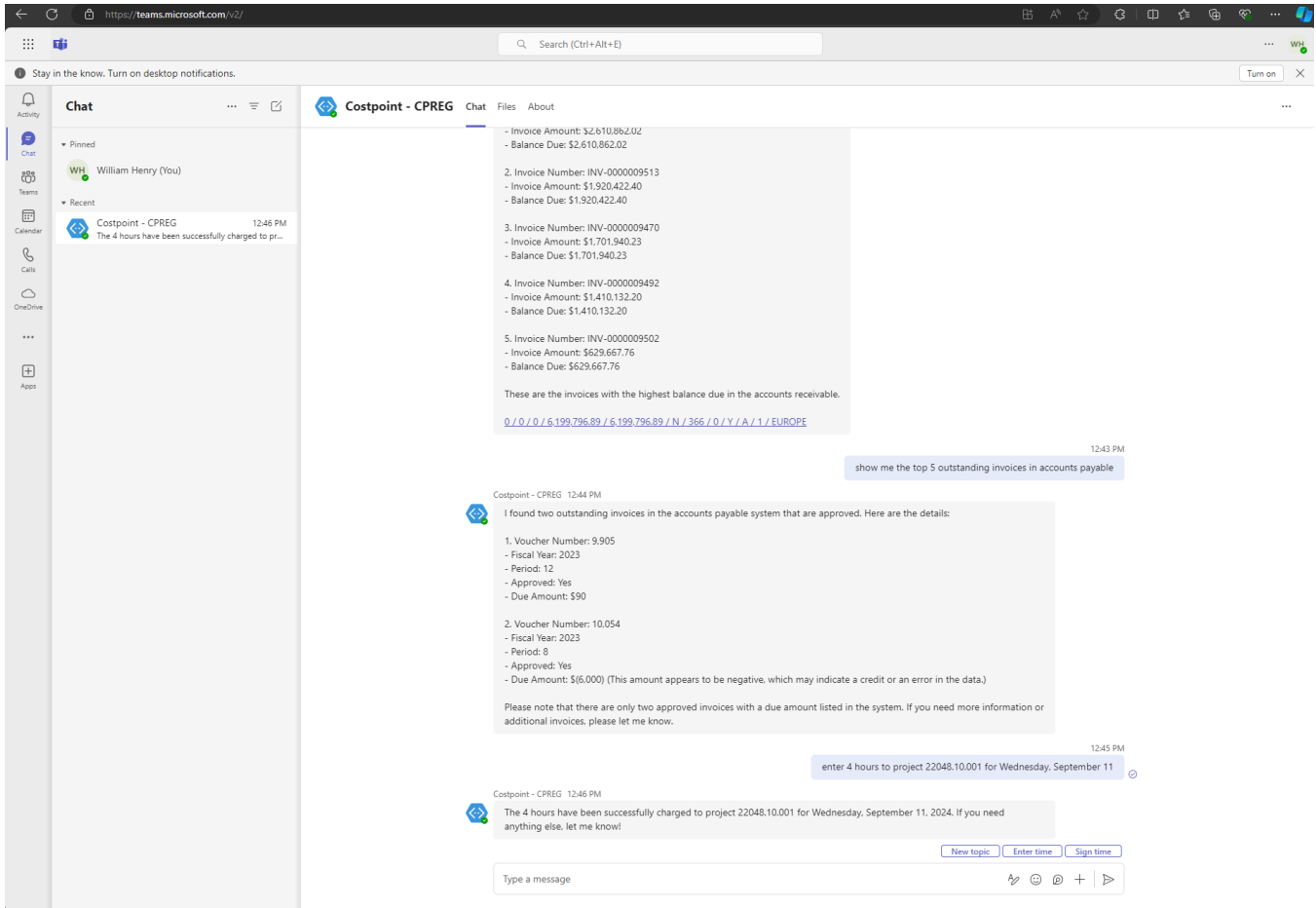
Enter time

Sign time



This functionality must be enabled separately and is an additional capability available in the Costpoint MS Teams App. Learn how to set up Interactive Messages in the [CIC](<https://help.deltek.com/product/costpoint/documentation/Updates.html>) or [CCIC.](<https://help.deltek.com/Product/Costpoint/Documentation/Cloud/Updates.html>)

- **AI Capabilities:** If your firm has enabled AI capabilities, you may utilize *Ask Dela* via the Costpoint MS Teams app. This means your AI Digital Assistant in Costpoint will be available directly from within Teams, allowing you to ask questions in MS Teams and receive the same responses as you would from Ask Dela in Costpoint. This functionality extends to inquiries about projects, people, parts, vouchers, and more - essentially, any questions that would work with the Digital Assistant inside the Costpoint UI will also work with the Costpoint MS Teams app.



If you only want to use MS Teams for notifications and not for AI assistant interactions with Costpoint, you can disable the AI for MS Teams integration. To turn off AI interactions while still receiving MS Teams notifications, go to **Admin » Configure System Settings » Corporate Settings**, click the **Dela** tab, and select **Disable Dela for MS Team Integration**.

Currently Microsoft does not support Interactive Emails in MS GCC High.

How do you configure Dela?

- A Costpoint administrator must enable Dela and accept the legal disclaimer to make it available to all users. You can enable Dela by going to Configure System Settings and then click Enable Dela under the Corporate Settings section.
- Dela can be enabled or disabled at the corporate level within each Costpoint system.
- Each user must accept the legal disclaimer and related terms and conditions.
- If needed, on-premises customers can utilize the "bring your own key" model and use the Configuration Utility to set up connections with the Azure OpenAI Model API.

- On-premises customers requiring AI services in Azure Government Cloud should use the "bring your own key" model.
- Costpoint supports load balancing between multiple AI instances to enhance both overall throughput and reliability (On-premises customers).

How do you configure the Costpoint MS Teams App?

Configuration: Detailed setup information is available in Appendix I in the [Deltek Costpoint Configuration Utility Guide](#). A portion of the setup involves using the new Microsoft Teams Bot Connection Information subtask on the Manage System Integration Accounts screen.

After configuration, you can add the Costpoint MS Teams app in MS Teams. To use MS Teams, you must have an email address assigned to your account in Manage Users. If you share the same email address with other users, MS Teams will prompt you to specify which user 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.

What security controls and user permissions does Dela utilize?

- Costpoint AI operates within the same security framework as the user logged into the system.
- Dela accesses data using the same mechanisms and permissions as the authenticated user, ensuring compliance with all organization and security policies.
- All user roles, policies, and organizational security settings are automatically applied.
- Dela cannot access any data that the user cannot access through the appropriate application.
- Dela has no direct access to any database or file storage.
- Dela does not access or recognize any Costpoint data outside the user's permitted access.
- Some data may be hidden from being openly displayed by Dela, so users will need to retrieve this information directly from the appropriate application. With Costpoint v8.2.12, this limitation applies only to openly displaying SSNs.

What privacy measures does Deltek take regarding data processing?

- Costpoint does 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.
- Ask Dela allows users to save chat history locally, encrypted and stored in their web browser storage. This data is inaccessible to Costpoint Administrators or Deltek personnel. Costpoint Administrators can disable this functionality.
- Deltek may store the number of requests and their sizes as part of its billing model with Microsoft.
- Costpoint may collect and store depersonalized information about general usage of the AI, such as the total number of users, the number of conversations, user feedback, and other generic statistical data. Costpoint

Administrators can disable this functionality.

- Requests sent to Azure are stateless, meaning the request and response are "forgotten" upon completion.
- For communication between Costpoint and Microsoft Azure, HTTPS/TLS is used to secure data in transit.

Are there specific data retention policies for information processed by Dela, and how can users manage or delete their data?

- Deltek does not store any information processed through Dela.
- Users may store up to 90 days of conversation history from Ask Dela using web browser storage. This information is available only from the browsers that were used and is stored locally and encoded. Neither Costpoint Administrators nor Deltek personnel have access to the user conversation history. Costpoint provides administrators the ability to disable this functionality and offers a one-click UI for users to clear their history when needed.
- Our contract with Microsoft and resulting partner policy includes that our customers' data will not be retained or used to train LLMs. For more details regarding how data provided by you to the Azure OpenAI service is processed, used, and stored, please reference the following article: [Microsoft Data, privacy, and security for Azure OpenAI Service](#).

What measures are in place to prevent unauthorized access to data processed by Dela?

- The user must successfully authenticate with Costpoint before using Dela.
- All user communication is stateless and does not get stored by Deltek or its partners.
- All communication between Costpoint and Azure's API endpoints is secured and transferred via HTTPS/TLS.
- Deltek maintains an authentication key to the OpenAI Azure API.

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](#)