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Costpoint Planning Essentials Manage Project Budgeting Roles

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26 March 2026

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Overview

Deltek Costpoint Planning is a Web-based budget and cost reporting application that provides business intelligence and comprehensive project and operations fiscal performance management tools. Effective management requires collaboration and cooperation among all members of the project management community within the government contractor organization. Costpoint Planning provides the substance of that collaboration.

Collaboration depends upon the management tradition and authority structure that have been established within the organization, both of which can be evolving over time. Costpoint Planning users are either part of that authority structure or they are acting in direct support of its participating members. Therefore each Costpoint Planning user must have an established role that reflects legitimate management authority.

This guide provides information on managing roles in Project and Organizational budgeting.

You will also find information on logging on to Costpoint Planning and contacting Deltek Customer Care and other client services.

> **Note:** If you have not yet installed Deltek Costpoint Planning, please refer to your installation instructions.

Generic Staff Settings

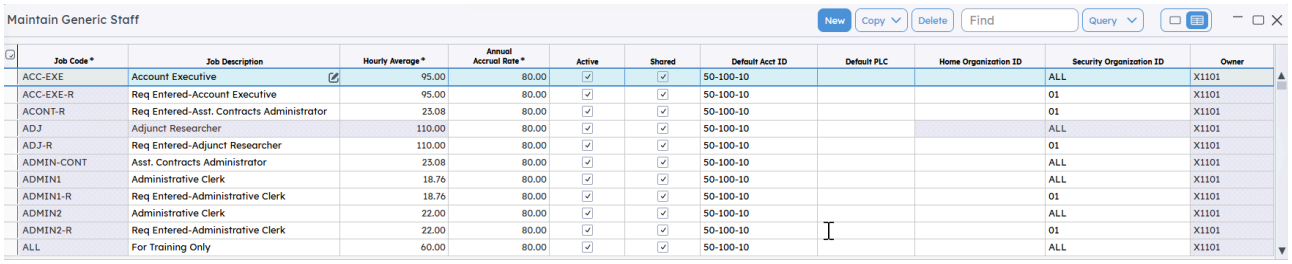
This section discusses the configuration of global generic staff, which is integral component of both Costpoint Planning's project and organization budgeting processes. You should load a generic staff list that reflects the labor categories and associated hourly cost and billing rates used by the organization contracts/proposal shop.

Maintain Generic Staff

The Maintain Generic Staff table report allows you to establish generic job categories that are useful when you assign people that you do not already have on staff. It also allows you to reflect future growth in the company. It is important to populate this data before Costpoint Planning users begin creating budgets.

To maintain the Generic Staff Table:

1. Click **Planning » Organization Budgeting » Controls and Utilities » Maintain Generic Staff**.



Job Code *	Job Description	Hourly Average *	Annual Accrual Rate *	Active	Shared	Default Acct ID	Default PLC	Home Organization ID	Security Organization ID	Owner
ACC-EXE	Account Executive	95.00	80.00	☑	☑	50-100-10			ALL	X1101
ACC-EXE-R	Req Entered-Account Executive	95.00	80.00	☑	☑	50-100-10			01	X1101
ACONT-R	Req Entered-Asst. Contracts Administrator	23.08	80.00	☑	☑	50-100-10			01	X1101
ADJ	Adjunct Researcher	110.00	80.00	☑	☑	50-100-10			ALL	X1101
ADJ-R	Req Entered-Adjunct Researcher	110.00	80.00	☑	☑	50-100-10			01	X1101
ADMIN-CONT	Asst. Contracts Administrator	23.08	80.00	☑	☑	50-100-10			ALL	X1101
ADMIN1	Administrative Clerk	18.76	80.00	☑	☑	50-100-10			ALL	X1101
ADMIN1-R	Req Entered-Administrative Clerk	18.76	80.00	☑	☑	50-100-10			01	X1101
ADMIN2	Administrative Clerk	22.00	80.00	☑	☑	50-100-10			ALL	X1101
ADMIN2-R	Req Entered-Administrative Clerk	22.00	80.00	☑	☑	50-100-10			01	X1101
ALL	For Training Only	60.00	80.00	☑	☑	50-100-10			ALL	X1101

2. Click the row where you want to make a change.

   - Generic Staff are assigned a General Ledger ID in your accounting system. Costpoint Planning grabs that data for this table.
   - The **Accrual Rate** represents the number of PTO hours per year.

   > **Note:** The default equates to two weeks of vacation (80 hours) plus one week of sick leave (40 hours), which equals 120 hours.

3. Enter or edit information in the following fields:

   - **Shared**: Select this check box to share the generic staff. Sharing instructs Deltek Costpoint Planning to allow this entry to appear in any drop-down lists where appropriate.
   - **Security Organization ID**: Select the level for this entry from the drop-down list.
   - The generic staff will be able to access anything at and below the level you choose.
   - If you have designated that this generic staff be shared, Costpoint Planning allows it to be shared according to the security level you designate.
   - **Active**: Select this check box to designate if the generic staff is active or not.

4. Enter a Job Code, Hourly Average and Accrual Rate (required fields) for any new generic staff you want to create.

5. Click **Close** to close the table.

Project-Specific Settings

To access Project-Specific Settings, click **Planning » Administration » Administration Controls » Maintain Project Budget Security.**

These settings determine how Costpoint Planning's project budget tools function and who can access that functionality. They also allow fine-tuning of the basic security settings for user access to project budgeting and reporting functions. In addition, accounting system-specified alternative project structures can be referenced so

that they can be reflected in Costpoint Planning's project navigation structure.

Costpoint Planning users, with a focus on the Project Management context, are linked to the project manager authority structure established in your accounting system. However, this authority structure does not reflect a workflow process for originating and approving project budgets and estimates-to-complete.

These settings can be established in Costpoint Planning with the Manage Additional Project Budget Approvers screen. In addition, Project Manager Matrix Rights allows project managers to access staff resources for budgeting purposes that are not included in their security organization.

If you have an alternative project structure established in your accounting system, Costpoint Planning allows this structure to be mapped into its project navigation structure. You may have multiple alternate project structures established for reporting purposes.

> **Note:** If more than one structure includes the same lowest level project task ID, then only one structure should be selected for mapping into Costpoint Planning. The Specify Valid WBS IDs option is used for this purpose.

Why Project-Specific Settings Are Important

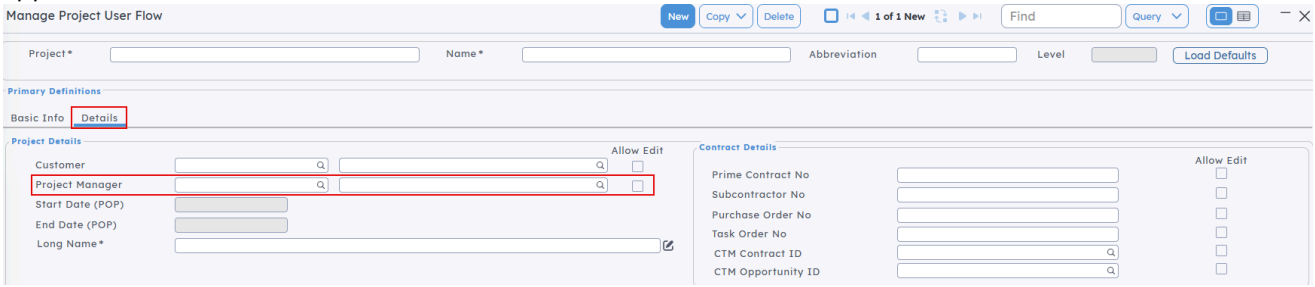
These settings determine how project budgeting tools work and who can access these tools. Establishing and managing project budgets are a critical part of establishing a cooperative, collaborative process of project financial accountability.

This ultimately can impact your company's ability to ensure that projects are executed within available funds in a method that preserves profitability.

It is up to you to determine the appropriate management authority structure that will underlie the budget creation and workflow process.

As you proceed, take note of the following:

- Costpoint Planning assigns project managers in the project manager field in Project Master as budget approvers.



- Approval authority for lower level project managers must be created in the Costpoint Planning database because it does not exist in the accounting system.

- It is up to you to determine the appropriate management authority structure that will underlie the budget creation and workflow process.
- Approval is necessary to establish a frozen budget, (a requirement of the Estimate-at-Complete process)

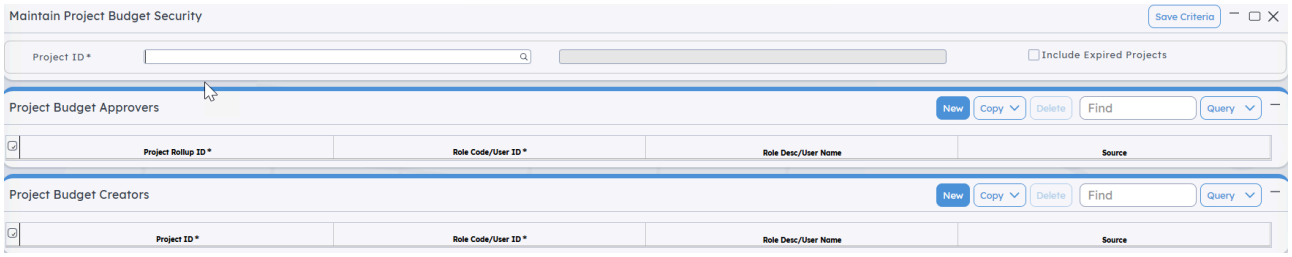
Maintain Project Budget Security

Costpoint Planning assigns the highest level project manager as a budget approver. Approval authority must be created in the Costpoint Planning database for managers assigned at roll-up levels. It is up to you to determine the appropriate management authority structure that will underlie the budget creation and workflow process.

Approval is necessary to establish a frozen budget (a requirement of the Estimate-at-Complete process) and is critical to fulfilling Earned Value Management (EVM) requirements, if they exist.

To add additional project budget approvers and creators:

1. Click **Planning » Administration » Administration Controls » Maintain Project Budget Security**.



2. Click **New** from the toolbar. A new row is added to the table.

3. Enter, or click to select, details for the Project, User ID, and User Name columns.

4. Click **Save**.

Manage Project Manager Matrix Rights

The Manage Project Manager Matrix Rights screen allows you to control which employees display in the budget employee drop-down list, allowing managers to determine employees outside their security org.

To add project manager matrix rights:

1. Click **Planning » Administration » Administration Controls » Manage Project Manager Matrix Rights.**

2. Click **New** from the toolbar. A new row is added to the table.

3. Enter, or click to select, details for the User ID, User Name, and Org ID columns.

4. Click **Save**.

Project Manager Administrative Options

As a project manager, you have been established as an authority over what must be accomplished on behalf of the customer, who will be participating in the effort, and what funds will be consumed during the process.

It is up to you to make sure that your authority as a Costpoint Planning user is not compromised. Changing your password on a regular basis can contribute greatly to limiting unauthorized access to the details of your project's cost and performance.

When it is necessary to share your authority as a project manager with other trusted support staff, Deltek Costpoint Planning provides a method to manage the sharing process. Through this process, you are able to assign access to your projects to other Costpoint Planning users whose user security settings lack access rights.

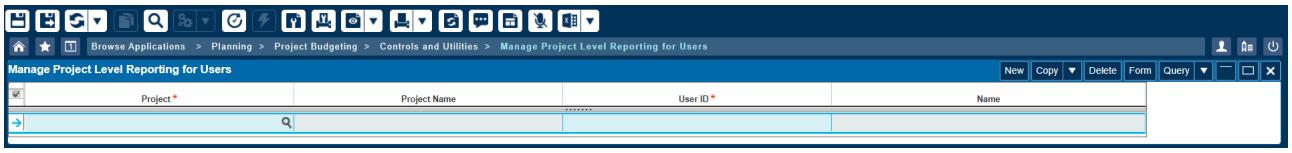
Managing projects requires cooperation and collaboration with other staff. Your accounting system may not reflect these necessary relationships. Costpoint Planning allows you to establish and manage these relationships so that you can take full advantage of the teamwork that you deem appropriate.

Manage Project Level Users

Use this screen to add project level reporting rights for users, allowing them to view additional projects and to share access with other users on multiple projects.

To share access with other users on multiple projects:

1. Click **Planning » Project Budgeting » Controls and Utilities » Manage Project Level Reporting for Users.**



2. In the **Projects** column, enter, or click to select, the projects to which users are going to have access.

3. In the **User ID** column, enter, or click to select, the users who are going to be allowed access to your projects.

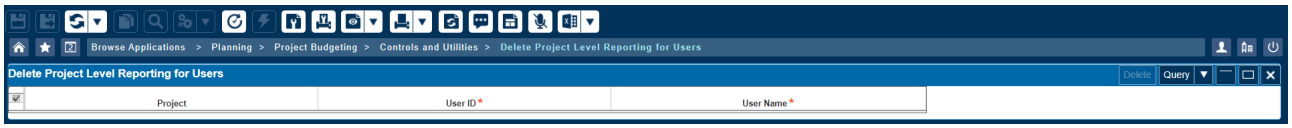
4. Click **Save**.

Delete Project Level Users

You use this action to take away access rights to projects. Deleting users will not take effect until the following day---after your Costpoint Planning data has been updated.

To remove shared access for specific Costpoint Planning users:

1. Click **Planning » Project Budgeting » Controls and Utilities » Delete Project Level Reporting for Users.**



2. Select the row of the user you want to remove from having access to your projects.

3. Click **Delete** from the toolbar next to each user you want to remove from having access to your projects.

4. When you click **Delete**, Costpoint Planning lets you know the action was successful.

   - You must delete users one at a time.
   - Click **Undelete** to cancel the delete action.

> **Note:** Changes made on this screen will not take effect until table update processing is run.

5. Click **OK** to close the window.