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Costpoint Planning Post Installation Configuration Guide

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26 March 2026

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Overview

The following list provides a brief overview of the procedures required to complete the post-installation configuration of Costpoint Planning. Each of these is described in detail within this document:

- Step 1: Activate Administration Rights

> Notes:
> - If you are a Deltek Cloud customer, proceed to section, Step 1 (Cloud): Activate Administration Rights
> - If you have an on-premise installation of Costpoint Planning, proceed to section, Step 1 (On-Prem): Activate Administration Rights

- Step 2: Post Install Setup
  During the post-installation setup, you will do the following:
  a. Configure Settings
  b. Maintain Account Mapping
  c. Finalize Setup
- **Step 3: Set Up the Refresh Process**: Set up scheduled jobs, entailing the following:
  a. Create Refresh Job Parameters
  b. Create a Job ID
  c. Create a Job Queue
  d. Create a Job Server
  e. Add Job to the Queue
  f. Assign Queue to Job Server
- Step 4: Add Users to Costpoint
- **Step 5: Assign Users to Costpoint Planning User Groups**: Set up groups of applications which will be accessible to users.
- **Step 6: Enable User Security Options**: Set security options specific to Costpoint Planning for each user.
- **Step 7: Validate Data**: Compare report data in Costpoint Planning with Costpoint to confirm results.

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Step 1 (Cloud): Activate Administration Rights

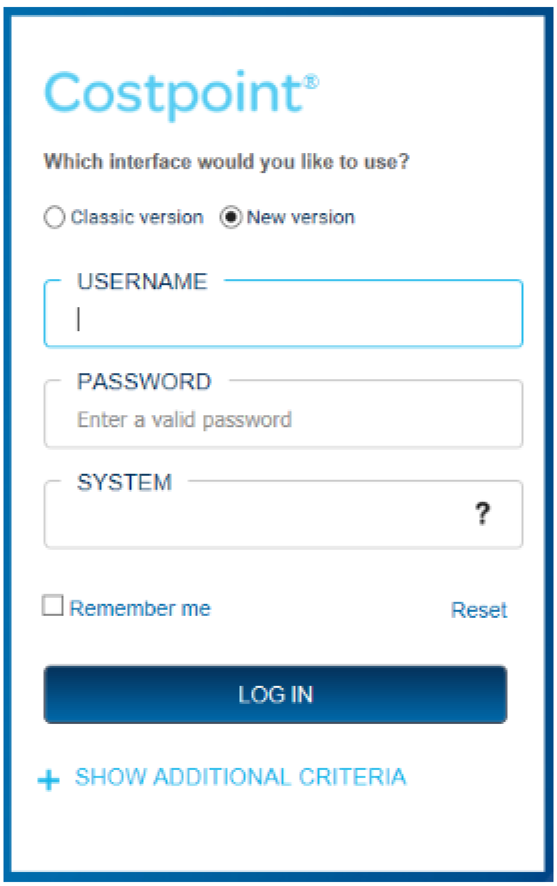
Note: If you have an on-premise installation of Costpoint Planning, skip to the next section:

Step 1 (On-Prem): Activate Administration Rights

If you are a Deltek Cloud customer, complete the steps described in this section.

To activate your Costpoint Administration rights:

1. Log on to Costpoint using your Costpoint **Username**.



2. Create a **User Group** (for example, **BNP_Admin**) that has rights to all the screens in **Costpoint Planning**, and then assign to that user group the **Planning Administrator** who is performing the post-installation configuration steps.

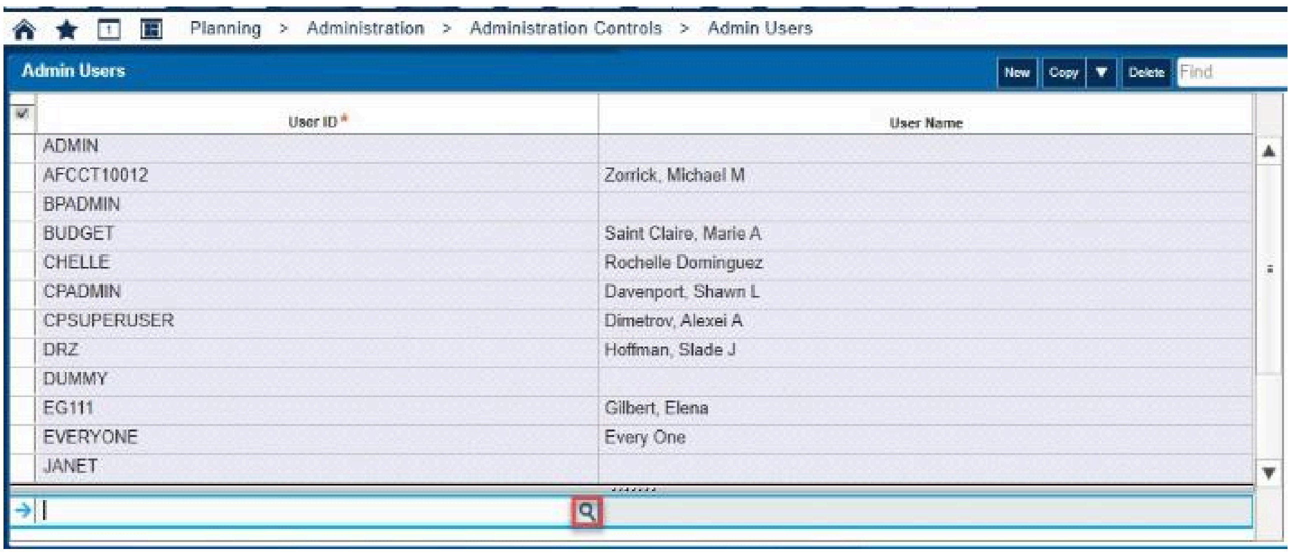
Note: You will perform this step from **Planning » Administration » System Security » Manage User Groups**. Detailed information about this screen is available from within the online help. After you open the Manage Users Groups screen, click Help on the Costpoint Help menu for more information.

3. Assign rights to the Planning Administrator:

   a. Click **Planning » Administration » Administration Controls » Admin Users**.

   b. Click **New** to add a row.

   c. Click in **User ID** and select the Admin user you want to add.



Administrators who are added to this screen will be authorized to do the following:

- Take ownership of new business budgets.
- Use the Manage Security Org rights screen, where they can give Org access to other end-users in Planning.

d. Click .

Step 1 (On-Prem): Activate Administration Rights

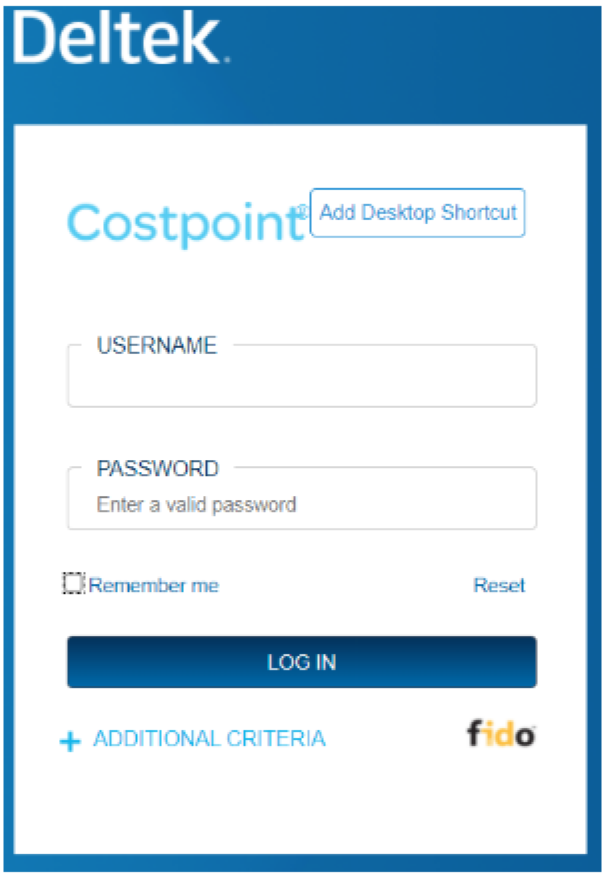
Note: If you are a Deltek Cloud customer, refer to the previous section:

Step 1 (Cloud): Activate Administration Rights

If you have an on-premise installation of Costpoint Planning, complete the steps described in this section.

To activate Costpoint Administration Rights:

1. Log on to Costpoint as **CPSUPERUSER**.

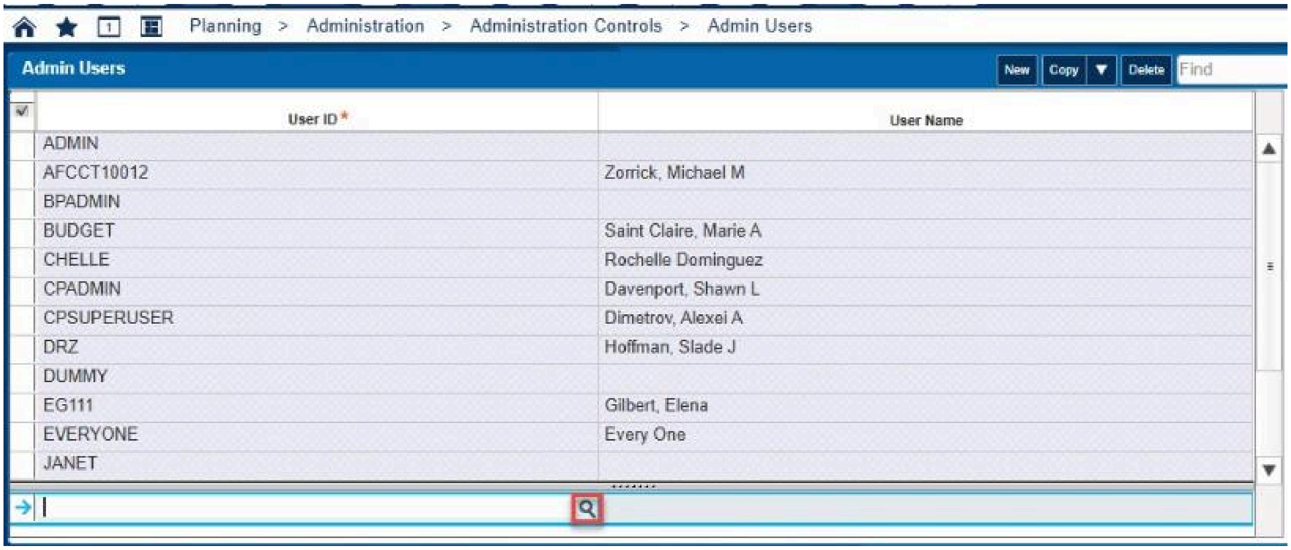


2. Assign rights to the Planning Administrator:

   a. Click **Planning » Administration » Administration Controls » Admin Users**.

   b. Click New to add a row.

   c. Click in **User ID** and select the Admin user you want to add.



Administrators added to this screen will be authorized to do the following:

- Take ownership of new business budgets.
- Use the Manage Security Org rights screen, where they can give Org access to other end-users in Planning.

d. Click .

Step 2: Run the Post-Install Setup Wizard

The Post-Install Setup utility is wizard application where you will import data, basic account mapping, and configure your Costpoint Planning installation.

Wizard Overview

The following is an overview of the type of information that is completed in each wizard screen:

- **Configuration Settings**: This step of the wizard contains six separate tabs for configuring account levels, display, and reporting, as well as Org and Project.
  Decisions regarding how to set each option will require advance input from personnel within your company, who may also require advice from outside consultants.
  The note below includes a link to the "Costpoint Planning Configuration Settings Worksheet." This document includes descriptions and notes for each configuration setting, and also includes a column where the decision is indicated.

The Worksheet also includes a key section that provides additional, critical background on the new Org Budget Revenue Calculation setting. This setting affects all Organization Budgets. Decisions regarding this setting must be carefully considered, because switching methods later would be an involved process, which may require Customer Care assistance.
Since access to the Configuration Settings screen is limited to System Administrators, you will refer to the completed document when choosing the settings.

> Note: Costpoint Planning Configuration Settings Worksheet.
>
> Click the above link to download the document and personally distribute to Accounting personnel and other decision-makers, or right-click the link and select **Copy Link Location** to distribute the link itself.
>
> The document includes a Decision column, where the choice for each setting should be indicated before the document is returned to you.

- **Maintain Account Mapping**: This screen displays the results of the account mapping. Note, however, that the results can be validated by Accounting later from **Planning » Administration » Administration Controls » Maintain Account Mapping**. Verify the results and edit if necessary.
- **Finalize Setup**: On this final step, click **Finish** to complete the synchronization process.

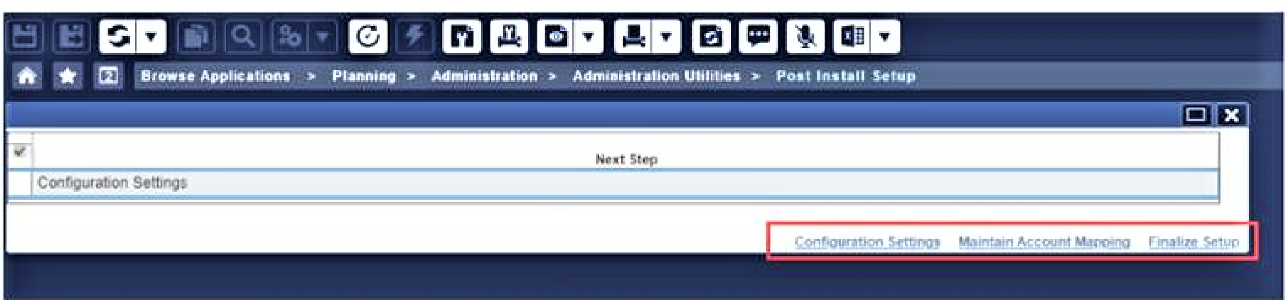
Open the Post Install Setup Utility

To start the set-up wizard:

1. Click **Planning » Administration » Administration Utilities » Post Install Setup.**

   Note that this application can be run only from Company 1 if you have a multi-company setup.

   The Post Install Setup screen displays the next step of the wizard. Click the subtask link that matches the text in the **Next Step** field to continue through the wizard.

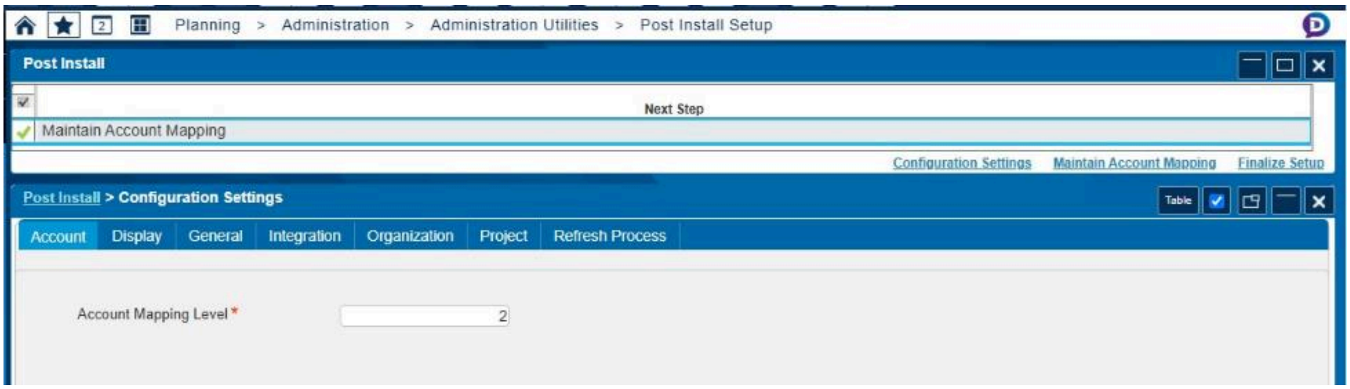


2. Click **Configuration Settings** to continue to the first step.

> **Note:** You can also stop the post installation setup at any step and later resume where you left off. If you go back to a previous step to make changes, the configuration setup will begin from that point, and you will be required to complete the remaining steps.

Implement Configuration Settings

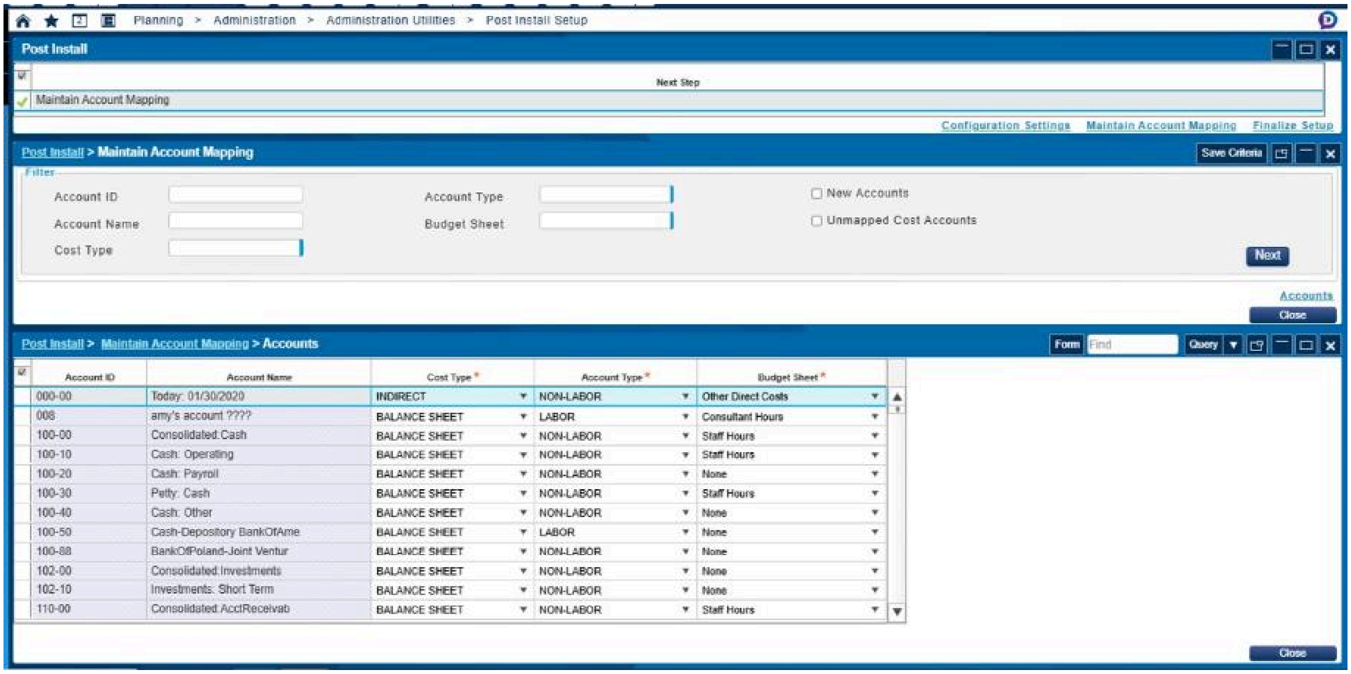
This step of the wizard requires you to complete fields on six separate tabs. Refer to the completed "Configuration Settings Worksheet" when choosing settings in this part of the wizard.



> **Note:** The Post-Installation Utility can be run only one time. If you later need to change settings described in this step of the utility, click **Planning » Administration » Administration Controls » Configuration Settings**.

Verify Account Mapping

In this step of the wizard, you will verify that the accounts imported in the previous step are mapping correctly. Use the Maintain Account Mapping screen to maintain system rules for the treatment of G/L accounts.



Depending on the field, you can enter or select which cost type, account type, report type, budget sheet, and major key an account is assigned to.

This grid displays all summary level accounts only and maps the accounts to the report types for reporting purposes. Most of the accounts will be set up correctly from your accounting system, but Deltek recommends that you review and verify some of the accounts.

> Note: This screen can be opened later from **Planning » Administration » Administration Controls » Maintain Account Mapping.**

To verify and/or edit your account mappings:

1. On the **Maintain Account Mapping** form, complete the following fields to filter the display of account mappings:

Field	Description
Account ID	This field displays the account ID table. Note that this will show the accounts at the level in which 'Configuration Settings / Account / Summary Account Level' has been set (unless the branch does not go down that low and then will show level higher in the tree).
Account Name	This field displays the account name of the Account ID.

Field	Description
Cost Type	To change the Cost Type, click and select from the following options: ▪ Direct ▪ Indirect ▪ Revenue ▪ Balance Sheet
Account Type	To change the Account Type, click and select from the following options: ▪ Labor ▪ Non Labor ▪ PTO Fringe Labor
Budget Sheet	The Budget Sheet is the Project Budget/EAC subtask for data entry. To change this option, click on the budget tab. The chosen Budget Sheet controls the budget subtask account which is available for data entry.

2. Click **Execute** to populate the Accounts table.

3. In the **Accounts** table, modify the account mapping if needed.

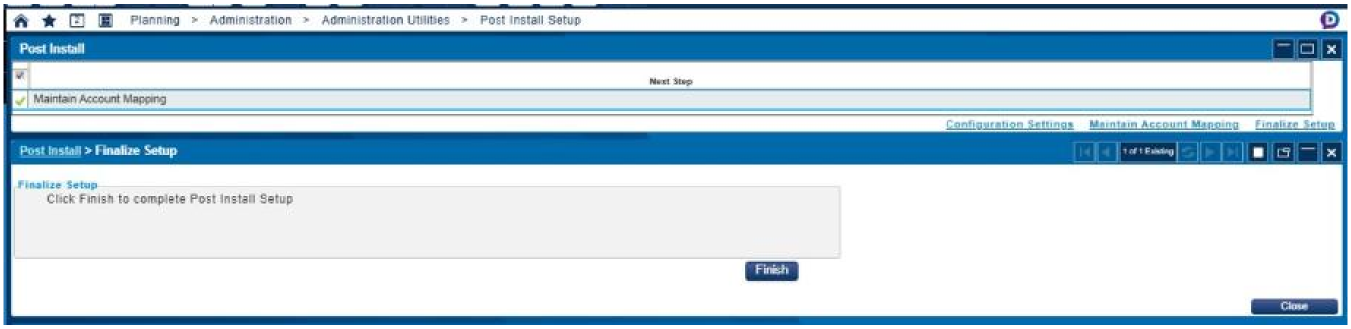
4. Click .

> Note: If you make changes to this page and run the refresh process, the refresh process will only pull in new records from the accounting system.

5. Click **Next**.

Finalize Setup

On this final step, click **Finish** to complete the synchronization process between products.



When you click **Finish**, the remainder of the update process is completed. After it concludes, the **Post-Installation Setup Completed** box on the General tab is automatically selected.

Step 3: Set Up the Report Table Update Process

This step is only required if you use Cognos BI or if you have any custom code in the database.

In this step, you will set up the refresh process, which includes creating scheduled jobs.

The purpose of the refresh process is to bring in all of the new data to populate the following tables:

- Business Intelligence (BI) report tables
- Custom Report Tables

The Costpoint Planning **Report Table Update Process** is generally run on a nightly basis via the Job Server.

Setting up the update process requires six separate procedures performed in the following sequence:

1. Create refresh job parameters.

2. Create job ID.

3. Create a job queue.

4. Create a job server.

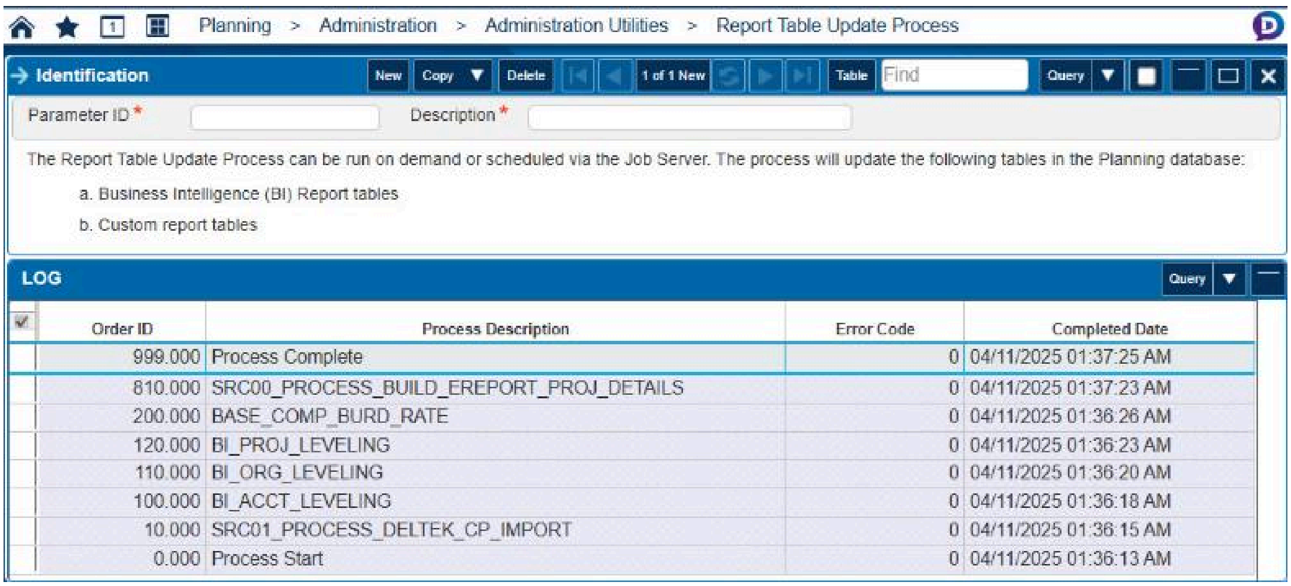
5. Add job to queue.

6. Assign queue to job server.

Create Refresh Job Parameters

To create a job parameter:

1. Click **Planning » Administration » Administration Utilities » Report Table Update Process.**



2. On the **Report Table Update Process** screen, set the **Parameter ID** to **REFRESH**.

3. Set the **Description** to **Costpoint Planning Refresh Process**.

4. Click **Save & Continue**.

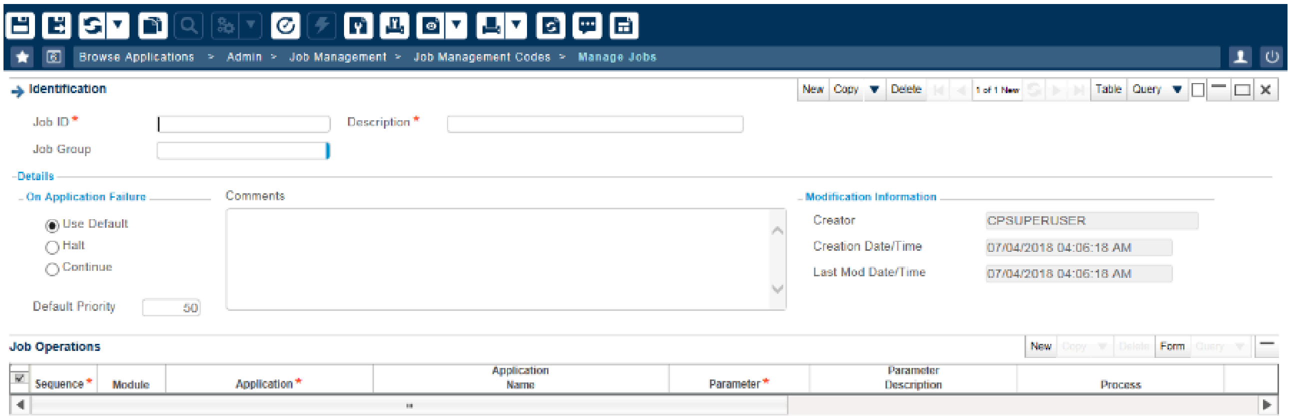
5. Exit the **Report Table Update Process** application.

Create a Job ID

In this step, you will create the job that is associated with the application and parameter you saved in step 1 of the previous procedure (Create Refresh Job Parameters).

To create a job ID:

1. Click **Admin** » **Job Management** » **Job Management Codes** » **Manage Jobs**.



2. On the **Manage Jobs** screen, enter or select the following values.

Field	Field Value
Job ID	Enter **BNPREFRESH**.
Description	Enter **PLANNING REPORT REFRESH**.
On Application Failure	Select **Use Default**.
Default Priority	Enter **1**
Job Operations	In the table, complete the following fields: ▪ **Sequence**: Enter **1**. ▪ **Module**: Enter **BA**. ▪ **Application**: Enter **BNP_BAPREFRESH** or click to select it. ▪ **Parameter**: Enter **REFRESH** or click to select it from Lookup. ▪ **Process**: Enter **BNP_BAPREFRESH_IMPORT** or click to select it.

3. Click .

4. Exit the **Manage Jobs** application.

Create a Job Queue

To create a job queue:

1. Click **Admin » Job Management » Job Management Codes » Manage Job Queues**.

2. In **Job Queue ID**, enter **BNP**.

3. Click .

4. Exit the **Manage Job Queues** application.

Create a Job Server

To create a job server:

1. Click **Admin » Job Management » Job Management Processing » Start/Stop Job Server**.

2. Enter or select values in the following fields:

Field	Field Value
Server Name	Enter **BNPSERVER**.
Destination Server	Select **Default Server or Cluster** from the drop-down list.

3. Click .

4. Exit the **Start/Stop Job Server** application.

Add Job to the Queue

In this step, you will assign the Job Queue you created in the above procedure (Create a Job Queue).

To submit a job to the queue:

1. Click **Admin » Job Management » Job Management Processing » Submit Job Queue**.

2. In the **Jobs Query** screen, query **All**.

3. On the **Submit Job to Queue** screen, enter or select values in the following fields:

Field	Field Value
Job	Enter **BNPREFRESH** in the popup **Query**..
Queue	Select BNP or click to select it.
Execution Option	Select **Start Time/Date** from the drop-down list.
Start Date	Click and select tomorrow's date.
Start Time	Set time to **0200**.
Recurrence Frequency	Enter **1**.
Recurring Time Frame	Select **Days** from the drop-down list.

4. Click **Submit to Queue** to submit the job to the queue.

5. Exit the **Submit Job to Queue** application.

Assign Queue to Job Server

To assign a job to the queue:

1. Click **Admin » Job Management » Job Management Processing » Start/Stop Job Server**.

2. In **Job Servers** table, select **BNPSERVER**.

3. In the **Assigned Job Queues** table, click **New**, then enter or select values in the following fields.

Field	Field Value
Job Queue	Enter **BNP**.
Active for Server	This field should be checked.

4. Click .

5. Click **Start**.

6. Exit the **Start/Stop Job Server** application.

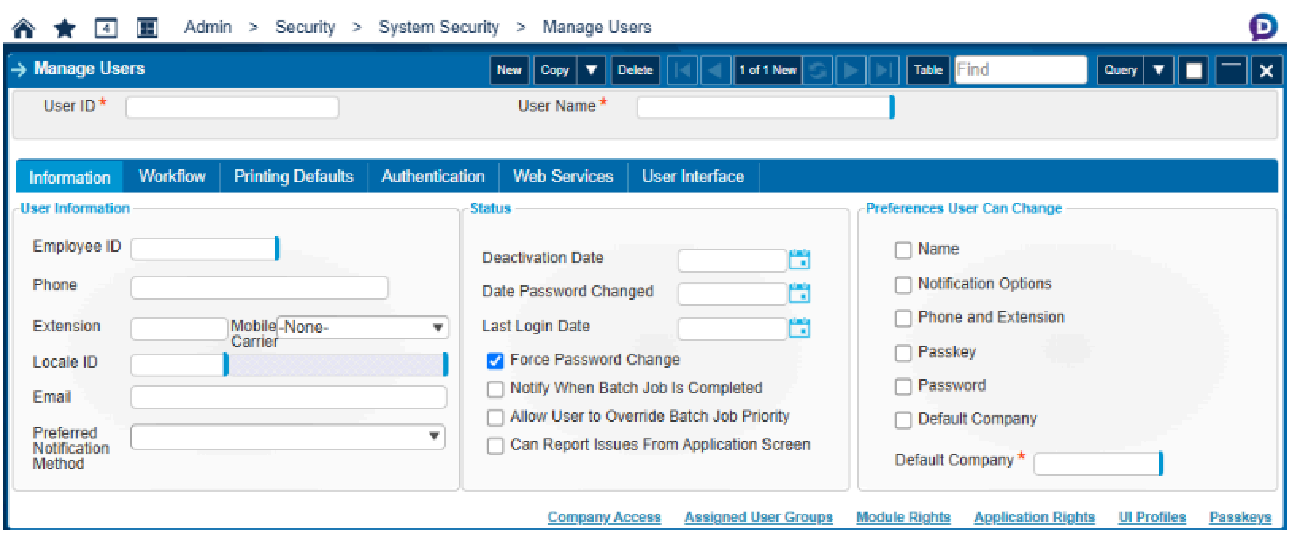
Step 4: Add Users to Costpoint

In this step, you will add employees to Costpoint.

> **Note:** If your installation of Costpoint Planning is new, but you are an established Costpoint customer and your employees already exist within Costpoint, you can skip to
>
> Step 6: Enable User Security Options

To add users in Costpoint:

1. Click **Admin » System Security » Manage Users**.



This screen has the following tabs:

- **Information**: Enter user information, such as password, status, assign a preferred notification method, and assign permissions to change user information.
- **Workflow**: Specify workflow and email user preferences.
- **Printing Defaults**: Enter a user's default Web printing settings and locale (if they differ from the system defaults).

- **Authentication**: Define how Costpoint verifies user login.
- **Web Services Tab**: This tab includes authentication options specifically for web services.
- **User Interface**: Specify settings for screen configuration changes.

2. Click **New** to add a user.

> **Note:** Detailed information about this screen is available from within the Costpoint online help. After you open the Manage Users screen, click **Help** on the Costpoint Help menu.

3. Click .

Step 5: Assign Users to User Groups

Security for module, screen, and application access is managed through user groups. In this step, you will create user groups and assign users to them.

The Manage User Group feature enables you to create separate menus for a single user or group of users.

Although the licensing structure enables you to automatically limit access to only the modules, screens, tabs, and reports by user type (for example, project manager, organizational manager, or administrator), this feature enables you to further limit the access to smaller subsets of users within the existing licensing structure.

To set up users in Costpoint:

1. Click **Admin » System Security » Manage User Groups.**

The image above is taken from an environment where groups have already been created, and as such, the data is not representative of what will display for you. However, after you create your Users Groups, those groups will display in the upper table of the screen.

2. Click **New** in the User Group table to create a User Group. Further establish security and access rights for that group using the following subtasks:

   - Assign User to Group: Use this subtask to assign users to a user group.
   - Module Rights: Use this subtask to assign **Read-Only**, **Full**, or **Deny** rights in one or more Costpoint modules to a user group by company.
   - Application Rights: Use the fields in this subtask table window to assign **Read-Only**, **Full**, or **Deny** rights to a user in one or more Costpoint applications within a module.
   - Active Directory Groups: Use this subtask to load Active Directory (AD) groups to Costpoint from a pre-generated CSV file.
   - UI Profiles: Use this subtask to view a list of user interface (UI) profiles.

   Note: For more detailed information about User Groups, see "User Access to Modules, Applications, and Reports" in the *Deltek Costpoint Security Guide.* Also see the Costpoint online help for the Manage User Groups screen.

3. Click .

Step 6: Enable User Security Options

In this step, you will review Costpoint Planning Org Security options for each user. Once you assign a user rights, they have access to all levels associated with the Org ID to which they are assigned.

To update user Org security information in Costpoint Planning:

1. Click **Planning » Administration » Administration Controls » Manage Security Org Rights.**

2. For each existing user, review, and where necessary, edit values in the following fields:

Field	Field Value
User ID	Click to select the ID of the user for whom you want to assign rights.
User Name	This column displays the name associated with the selected user ID.
Organization ID	Use this setting to assign users access to Security Org IDs within Costpoint Planning. If you select **All**, the user is granted access to all levels of the Org structure. To limit access to a specific Org ID within Costpoint Planning, click to select the ID. The level you choose gives the user access to that level and all levels below it. Note also that Org security for Costpoint Planning is separate from and unrelated to Costpoint Org security.
Organization Name	This field displays the name of the select org ID.

3. Click .

Step 7: Validate Data

Prior to first use, it is strongly suggested that you validate your setup, configuration, and account mapping by running a few key reports in both Costpoint and Costpoint Planning and comparing the results.

We suggest you run the Costpoint and Costpoint Planning reports listed in the table below and confirm that the results are the same. You should confirm that Costpoint has not had any updates since the last the last refresh was run in Costpoint Planning.

Costpoint Reports	Costpoint Planning Reports	Notes
Financial Statement **Accounting » General Ledger » General Ledger Reports/Inquiries » Print Financial Statements**	Profit and Loss by Account **Planning » Organization Budgeting » Profit and Loss Reports » Profit and Loss by Account**	In Costpoint Planning, select **Cost** (actuals) under Report Type.
CP Statement of Indirect Expenses **Projects » Cost and Revenue Processing » Cost Pool Processing » Compute/Print Pool Rates**	Rate Analysis by Org report **Planning » Organization Budgeting » Rate Processing/Reports » Rate Analysis by Org**	In Costpoint Planning, select **Cost** (actuals) under Report Type, and **Pools** under Pool Type. Run the report for each pool and compare the results to the same pools in Costpoint. To view the Statement of Indirect Expenses report in Costpoint without processing Cost Pools, do the following: 1. Complete parameters on the Compute/Print Pool Rates screen. 2. Click  on the toolbar.
Project Status **Projects » Project Inquiry and Reporting » Project Reports/ Inquiries» Print Project Status Report**	Project Status report **Planning » Project Budgeting » Supplemental Reports » Project Status**	Use same parameters in both Costpoint and Costpoint Planning.

Appendix A: Other Tasks

This concludes all of the post-installation configuration tasks that must be completed prior to first-use. However, there are other tasks related to establishing roles and managing users in Org and Project Budgeting, such as the following:

- **Maintain generic staff**: Establish generic job categories that are useful when you assign people that you do not already have on staff.
- **Maintain organizational budget approvers**: Establish who can create, edit and approve Org Budgets.
- **Maintain project budget approvers**: Establish the appropriate management authority structure that will underlie the budget creation and workflow process.

For more information on these additional tasks, see the "Costpoint Planning: Manage Org and Project Budgeting Roles" guide.