

Costpoint User Migration Utility

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Costpoint User Migration Utility

Overview

Costpoint 7 introduces an enhanced security framework. This framework requires a different setup for users and user groups than the one used for Client/Server users in earlier versions of Costpoint. Security data is stored in a different set of tables.

A Costpoint 6.x Client/Server user cannot log into Costpoint 7 until the user has been recreated in Costpoint 7. To simplify the task of re-creating users and user groups, Deltek has developed the Migrate Users Utility.

The utility lets you:

- Migrate users and user groups
- Migrate user and user group rights
- Reset Costpoint user passwords or assign new passwords to users who do not have any

You do not need to run this utility or migrate/recreate the security setup for users or user groups that were created in the Costpoint 6.x Web version. Setup for these users/user groups will be preserved during the upgrade to Costpoint 7.

Note: The Costpoint menu structure has been improved in version 7. Several new modules have been added and some existing applications are now part of different modules. Therefore, you will need to review all users' module/application rights after user migration.

For a full listing of these changes, see [Appendix C: List of Applications That Were Moved between Costpoint 6.x and 7.0](#).

When to Use the Migrate Users Utility

The Migrate Users Utility can be used either immediately after the upgrade to Costpoint 7 or later, at any point when an administrator needs to move additional users from the Costpoint 6.x Client/Server database to Costpoint 7. The process of migrating users, groups, and user rights can be done at one time for all users or incrementally over time as additional groups in the organization are migrated to Costpoint 7. Also, an administrator can always create new users directly through Costpoint 7. Using the Migrate Users Utility is not mandatory; although, it should make the migration process easier.

Administrators are encouraged to learn about the new security features in Costpoint 7—in particular, the ability to assign a user to multiple groups—before migrating or creating users.

For Additional Information

Refer to the Appendices at the end of this guide for additional information:

- Appendix A: User Group Rights Conversion Matrix: How user group rights are translated from Costpoint Client/Server to Costpoint 7 during the migration process
- Appendix B: User Rights Conversion Matrix: How user rights are translated from Costpoint Client/Server to Costpoint 7 during the migration process
- Appendix C: List of Applications That Were Moved between Costpoint 6.x and 7.0

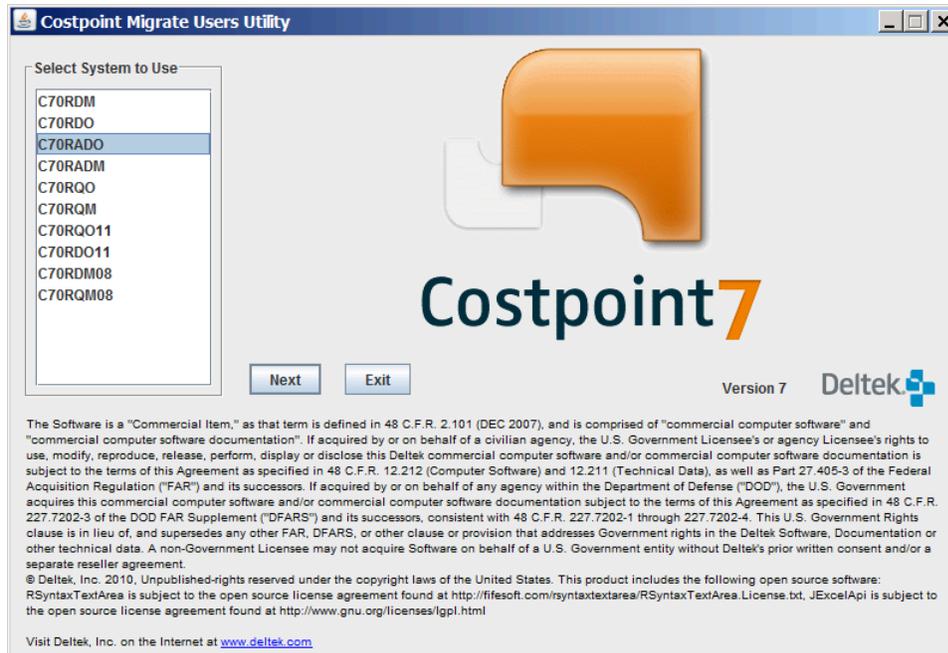
Migrate Users

To migrate users:

1. Run the `CPWebMigrateUsersUtility.cmd` batch file.

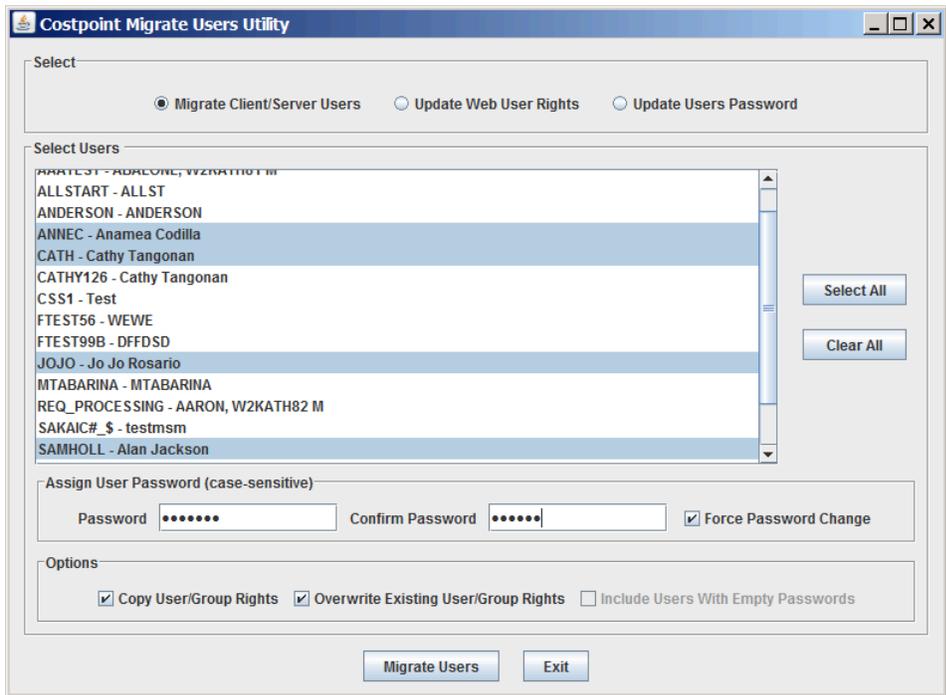
It should be located with the other Costpoint command files in the `\deltek\costpoint\71\bin` folder.

2. Select the system that you want to use for the migration, and click **Next**.



3. Select the **Migrate Client/Server Users** option at the top of the screen, and then select the user(s) that you

want to migrate.



Note: You can CTRL+click on the list to select specific names, or you click **Select All** to select the entire list

4. In the **Assign User Password** section, enter a password for the users in the **Password** field, and re-enter the password in the **Confirm Password** field.

This password gives users access to Costpoint 7. If you don't provide a password on this screen, you will need to assign a password to each user later, before the user can log into Costpoint 7.

Note: You can also use the Manage Users application in Costpoint 7 to set up and change user passwords.

5. (Optional) Select the **Force Password Change** check box to force users to change their passwords after their first login.
6. (Optional) Select **Copy User/Group Rights** if you want to migrate the rights associated with users and the user groups to which they belong.

If you select this option:

- A user's individual rights from Costpoint Client/Server will be copied to the same user in Costpoint 7.
- A user group's rights in Costpoint Client/Server will be copied to the same user group in Costpoint 7.

Attention: Review the appendices at the end of this document for more details about how data is migrated.

7. (Optional) Select **Overwrite Existing User/Group Rights** if you want to overwrite already existing user rights and user group rights on the Costpoint 7 side.

If you select this option, the first step in the migration process will be to delete any rights that exist on the Costpoint 7 side.

Warning: Be careful when you use this option because you may inadvertently reset and refresh group rights. For example, assume that users A and B both belong to Group X. User A was migrated earlier and now you are ready to migrate user B. Selecting this option means that the rights for Group X will also be reset and refreshed, affecting user A.

Review the appendices at the end of this document for more details about how data is migrated.

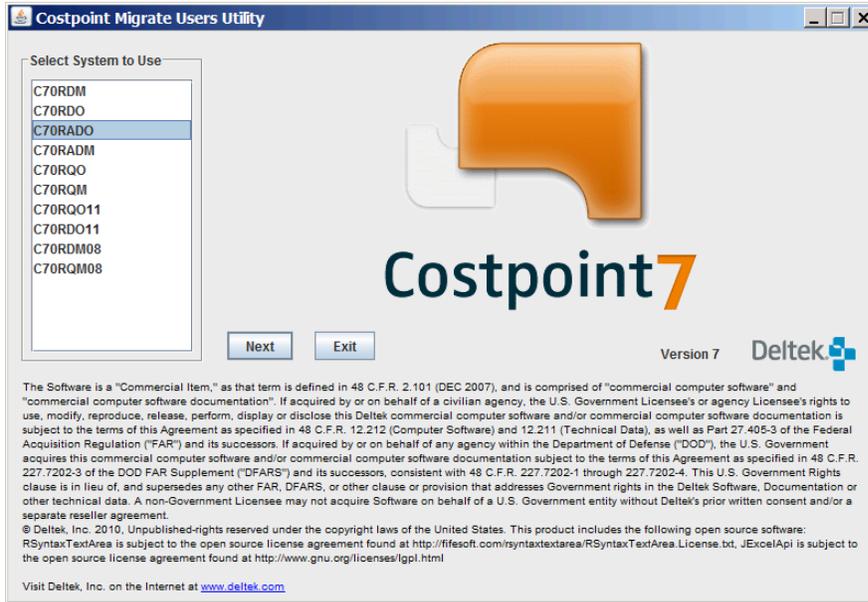
8. Click **Migrate Users**.

9. Click **Exit**.

Update Rights

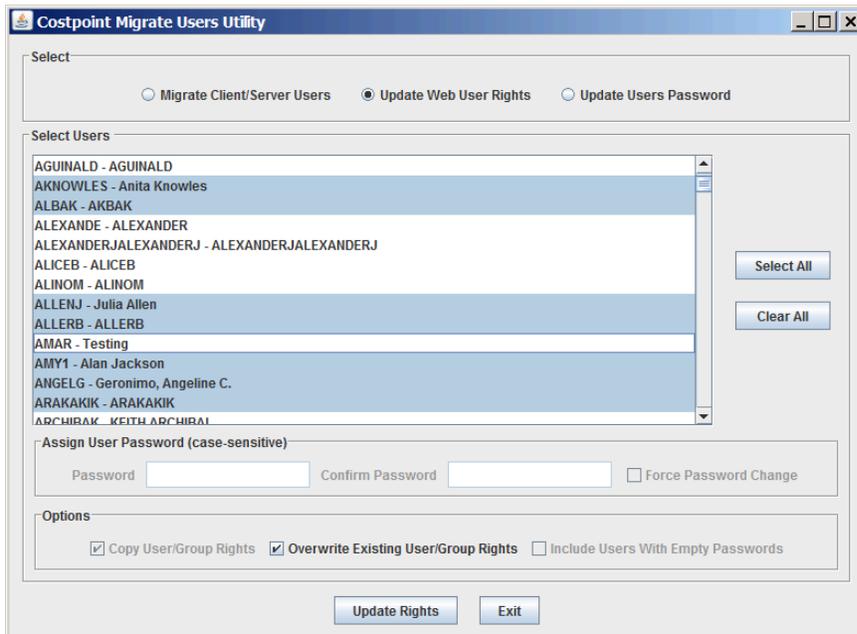
To update user rights:

1. Use the command file CPWebMigrateUsersUtility.cmd to start the utility.
2. Select the system that you want to use, and click **Next**.



3. Select the Update Web User Rights option at the top of the screen.

This option is useful if additional user rights or group rights have been assigned to a Costpoint Client/Server user and you wish to update the Costpoint 7 user with these additional rights.



4. Select the user(s) whose rights you want to copy from Costpoint Client/Server.

Note: You can CTRL+click on the list to select specific names, or you click **Select All** to select the entire list

5. (Optional) Select **Overwrite Existing User/Group Rights** if you would like to overwrite already existing user rights and user group rights on the Costpoint 7 side.

If this is the case, the first step in the migration process will be to delete the rights on the Costpoint 7 side.

Warning: Be careful when you use this option because you may inadvertently reset and refresh group rights. For example, assume that users A and B both belong to Group X. User A was migrated earlier and now you are ready to migrate user B. Selecting this option means that the rights for Group X will also be reset and refreshed, affecting user A.

Review the appendices at the end of this document for more details about how data is migrated.

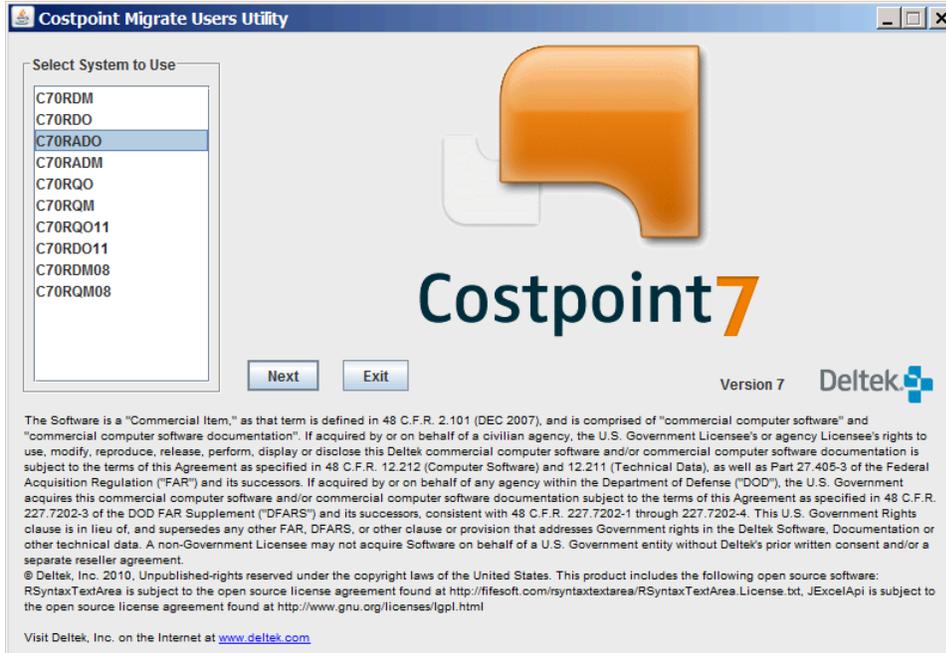
6. Click **Update Rights**.

7. Click **Exit**.

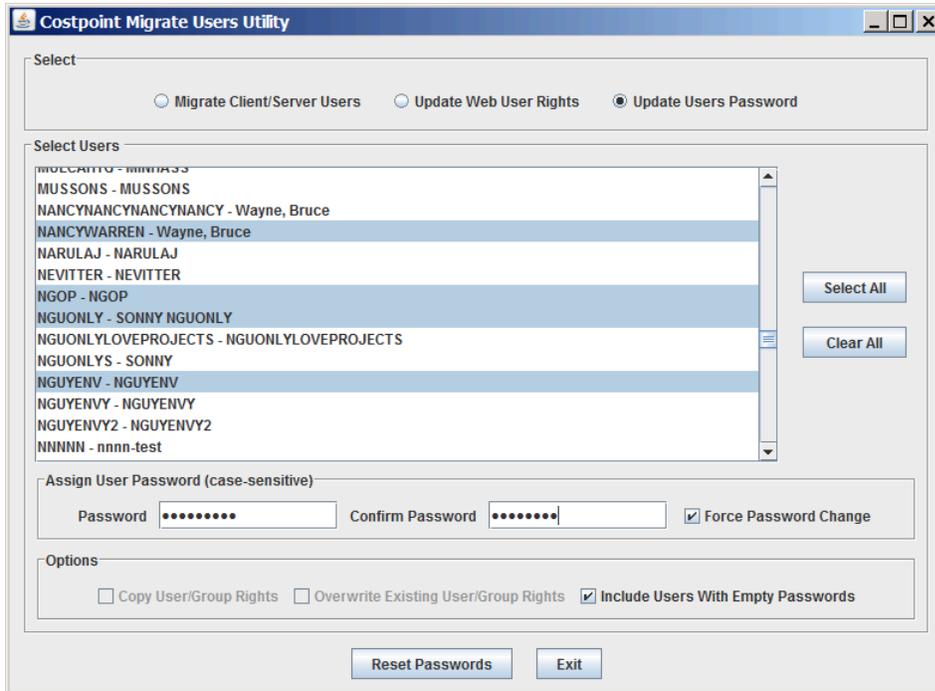
Reset and Assign User Passwords

To reset and assign user passwords:

1. Use the command file CPWebMigrateUsersUtility.cmd to start the utility.
2. Select the system that you want to use, and click **Next**.



3. Select the Update Users Password option at the top of the screen.



4. Select the user(s) who need their passwords reset or assigned.

Note: You can CTRL+click on the list to select specific names, or you click **Select All** to select the entire list

5. In the **Assign User Password** fields, enter a password for the users in the **Password** field, and re-enter the password in the **Confirm Password** field.

Note: You can also use the Maintain User application in Costpoint 7 to set up and change user passwords.

6. (Optional) Select the **Force Password Change** check box to force users to change their passwords after their first login.
7. (Optional) Select **Include Users with Empty Passwords** if you would like to reset the password for all users with blank passwords, not just those users you selected.
8. Click **Reset Passwords**.
9. Click **Exit**.

Data Transferred by the Utility

The Migrate Users Utility follows these rules to transfer data.

- Data from the following tables is transferred:

From Costpoint 6.1	To Costpoint 7.0
USER_ID_OLD	W_USER_UGRP_LIST
USER_COMPANY_OLD	W_USER_COMPANY
USER_GRP_OLD*	W_USER_GRP_USERS
USER_MRIGHTS_OVRD_OLD*	W_MODULE_RIGHTS
USER_RIGHTS_OVRD_OLD*	W_APP_RIGHTS
USER_GRP_MRIGHTS_OLD*	W_MODULE_RIGHTS
USER_GRP_RIGHTS_OLD*	W_APP_RIGHTS

*Data is transferred only if you selected the **Copy User/User Group Rights** option.

- The Client/Server groups **ALL**, **SETUP**, and **EVERYONE** are not copied.

- A user is automatically assigned to the group **EVERYONE**.
- User Client/Server group(s) are transferred only if you select the **Copy User/User Group Rights** option.
- A user will be assigned to the Client/Server group only if you select the **Copy User/User Group Rights** option.
- Client/Server application/module rights are transferred only if you select the **Copy User/User Group Rights** option and either one of the following is true:
 - The user does not have any rights already set up in Costpoint Web.
 - The **Override Existing Rights** option is selected.
- If a user already exists in Costpoint 7 and you select the **Copy User/User Group Rights** option, only user rights will be copied. User preference data entered through Costpoint Web (either in Costpoint Web 6.1 or Costpoint 7) will be retained.
- If you select the **Copy User/Group Rights** option:
 - A user's individual rights from Costpoint Client/Server are copied to the same user in Costpoint 7.
 - A user group's rights in Costpoint Client/Server are copied to the same user group in Costpoint 7.
Note: If you select both the **Copy User/User Group Rights** and **Overwrite Existing Rights** check boxes, the Migration Utility will remove Costpoint 7 users who are already assigned to the same user group. **This is the expected behavior.**
 The contents of a group (users assigned to a group) are treated as part of overall security rights; therefore, if you select **Overwrite Existing Rights** during user migration, all security rules for migrated users will be overwritten, including group content.
- In Costpoint 7, a number of applications were moved from one module to another. During the migration process, the utility will add an additional rights row(s) for such applications to the user (or user group) if the rights row(s) for the applications do not already exist.
Attention: For a complete list of applications that moved between modules, see [Appendix C: List of Applications That Were Moved between Costpoint 6.x and 7.0](#).
 For example, the Set Up Sales Group Abbreviations (PDMSALES) application was moved from the Product Definition (PD) module to the Sales Order Entry (OE) module. If a user had read-only rights to the PD module in Costpoint Client/Server, then during the migration (in addition to a module row), a new application-level rights row will be created to grant the user rights to the Set Up Sales Group Abbreviations (PDMSALES) application.
- The System Administration (SY) module was split into two modules: SY and Security (SS). During the migration process, the utility will create two module rows (one for SY and one for SS) for each SY module rights row for each user (or user group) that had rights to the SY module in Costpoint Client/Server. In addition, the Product Interfaces (AO) module was eliminated and all applications were reassigned to other modules. Therefore, any existing AO module rights will be converted into rights rows for individual applications.

Appendix A: User Group Rights Conversion Matrix

This table illustrates how user group rights are translated from Costpoint Client/Server to Costpoint 7 during the migration process.

Client/Server (CP 6.1)		Costpoint 7	
Module Rights	Application Rights	Module Rights	Application Rights
Full		Full	
Read-Only		Read-Only	
Partial		No Row Created	
	Full		Full
	Read-Only		Read-Only
	No Rights		No Row Created
	No Row		No Row Created
Partial - Optimistic		No Row Created	
	Full		Full
	Read-Only		Read-Only
	No Rights		Deny
	No Row		Full
No Rights		No Row Created	

Appendix B: User Rights Conversion Matrix

This table illustrates how user rights are translated from Costpoint Client/Server to Costpoint 7 during the migration process.

Client/Server (CP 6.1)		Costpoint 7	
Module Rights	Application Rights	Module Rights	Application Rights
Full		Full	
Read-Only		Read-Only	
Partial		No Row Created	
	Full		Full
	Read-Only		Read-Only
	No Rights		Deny

Client/Server (CP 6.1)		Costpoint 7	
	No Row		Deny
Partial - Optimistic		No Row Created	
	Full		Full
	Read-Only		Read-Only
	No Rights		Deny
	No Row		Full
No Rights		No Row Created	

Appendix C: List of Applications That Were Moved between Costpoint 6.x and 7.0.

This table lists applications that were moved from one module to another in Costpoint 7 (as compared to the Costpoint 6.1 Client/Server version).

App ID	Application Name	Old Module	New Module
AOMADP25	Manage ADP 2.5 Mapping Values	AO	LD
AOMADPMP	Manage ADP Mapping Values	AO	LD
AOMAIELM	Manage Interface Elements	AO	SY
AOMAIEVM	Manage Element Value Mappings	AO	SY
AOMAIICS	Manage Interface Configuration and Scheduler	AO	SY
AOMCBBET	Manage Cobra Budget Element Templates	AO	SY
AOMCBCHG	Manage Cobra Charge Templates	AO	SY
AOMCBCST	Manage Cobra Cost Templates	AO	SY
AOMCBEXT	Manage Cobra Extraction Parameters	AO	SY
AOMCBPRJ	Manage Cobra Program Mapping	AO	SY
AOMCBPYC	Manage Prior Year Cobra Costs	AO	SY
AOMCBPYC	Manage Prior Year Cobra Costs	AO	PJ
AOMCBSET	Configure Cobra Interface Settings	AO	SY

App ID	Application Name	Old Module	New Module
AOMCDCCN	Manage Ceridian Configuration	AO	LD
AOMCPPRM	Configure Advanced Planning and Scheduling Parameters	AO	PC
AOMCSET	Configure CTS Settings	AO	PR
AOMCTDAT	Manage CTS Tax File Data	AO	PR
AOMCTSW2	Manage CTS W-2 File Data	AO	PR
AOMESSAL	Approve Employee Life Events	AO	EM
AOMESSAP	Approve ESS Benefit Elections By Plan	AO	EM
AOMESSBE	Manage ESS Open Enrollment Elections	AO	EM
AOMESSBL	Manage ESS Life Event Benefit Elections	AO	EM
AOMESSCL	Manage ESS Company Links	AO	EM
AOMESSCS	Manage ESS Company Settings	AO	EM
AOMESSGS	Configure ESS Global Settings	AO	EM
AOMESSLE	Configure ESS Life Events	AO	EM
AOMESSRB	Manage ESS Retirement Benefit Elections	AO	EM
AOMESSST	Configure ESS State Tax Settings	AO	EM
AOMESSUF	Manage Life Event User Flow Status	AO	EM
AOMMICEC	Manage Microframe EOC Mappings	AO	CR
AOMMICOR	Manage Microframe OBS Mappings	AO	CR
AOMMICPJ	Manage Microframe WBS Mappings	AO	CR
AOMMICRS	Manage Microframe Resource Mappings	AO	CR
AOMPLMAP	Configure Project Planner Mapping Definitions	AO	BD
AOMPLNST	Configure Interface Settings	AO	BD
AOMSETCR	Manage Cash Receipts Preprocessor Settings	AO	AR
AOMSUEBP	Manage Employee Import User-Defined Format	AO	EM
AOMSUSAP	Manage Accounts Payable Voucher Suspense	AO	AP
AOMSUSJE	Manage Journal Entry Preprocessor Settings	AO	GL

App ID	Application Name	Old Module	New Module
AOMSUSTE	Configure TE Suspense Settings	AO	AP
AOMSUSTP	Configure Timesheet Suspense Values	AO	LD
AOMVSCL	Configure Client Upload Options	AO	SY
AOMVSCU	Configure Customer Options	AO	SY
AOMVSEM	Configure Employee Options	AO	SY
AOMVSOR	Configure Organization Options	AO	SY
AOMVSPJ	Configure Project Options	AO	SY
AOMVSPJ1	Configure Project Upload Options	AO	SY
AOMVSPJM	Manage Project Level Mapping	AO	SY
AOMVSVN	Configure Vendor Options	AO	SY
AOPADPTS	Export Timesheets to ADP	AO	LD
AOPAIAIC	Activate Instance Control	AO	SY
AOPBOM	Import Bills of Material	AO	BM
AOPCBLAB	Compute Cobra Burden Costs	AO	CR
AOPCBLAB	Compute Cobra Burden Costs	AO	SY
AOPCDCTS	Export Timesheets to Ceridian	AO	LD
AOPCPIMO	Import Manufacturing Order Status Updates	AO	PC
AOPCPLCP	Corporate Planner	AO	GL
AOPCPMO	Export Manufacturing Orders	AO	PC
AOPCPWC	Export Work Centers	AO	PC
AOPEPAD	Export eProcurement Addresses	AO	PO
AOPEPIA	Export eProcurement Inventory Abbreviations	AO	PO
AOPEPITM	Export eProcurement Items and Line Charge Types	AO	PO
AOPEPPAO	Export eProcurement Proj/Acct/Org	AO	PO
AOPEPRC	Export eProcurement PO Receipts	AO	PO
AOPEPRQE	Export eProcurement Requisitions	AO	PO

App ID	Application Name	Old Module	New Module
AOPEPVN	Export eProcurement Vendors	AO	PO
AOPESSDB	Update Benefit Option/Election Tables	AO	EM
AOPESSLI	Set/Reset ESS Login Information	AO	EM
AOPESSPG	Purge ESS Data	AO	EM
AOPESSUD	Activate ESS Retirement Benefit Changes	AO	EM
AOPESSUE	Activate Pending ESS Benefit Elections	AO	EM
AOPINTRN	Import Inventory Transactions	AO	IN
AOPITEM	Import Items	AO	PD
AOPMICDN	Create Microframe Transfer Files	AO	CR
AOPPLNCP	Import Project Budgets	AO	BD
AOPPOVCH	Import Purchase Order Vouchers	AO	AP
AOPPPLAB	Retrieve Labor Rates	AO	BD
AOPQTV	Import Vendor Quotes	AO	PP
AOPRCPRE	Import Purchase Order Receipts	AO	RC
AOPRQPP	Import Purchase Requisitions	AO	PP
AOPSCST	Import Subcontract PO Status Updates	AO	PO
AOPSOPP	Import Sales Orders	AO	OE
AOPUTLAM	Import Accounts Payable Multicurrency Vouchers	AO	AP
AOPUTLAP	Import Accounts Payable Vouchers	AO	AP
AOPUTLCR	Import Cash Receipts	AO	AR
AOPUTLDL	Import Employee Leave and Deductions	AO	EM
AOPUTLEL	Import Employee Data	AO	EM
AOPUTLJE	Import Journal Entries	AO	GL
AOPUTLPO	Import Purchase Orders	AO	PO
AOPUTLTE	Import TE Expense Report	AO	AP
AOPUTLTS	Import Timesheets	AO	LD

App ID	Application Name	Old Module	New Module
AOPUTLVU	Import Vendors	AO	AP
GLPTOOL1	Update Beginning Bank Statement Balances	GL	CM
PDMSALES	Set Up Sales Group Abbreviations	PD	OE
PJPAAFC	Assign Account Function Codes	PJ	CR
PJPCKAO	Validate Pool Acct/Org Setups	PJ	CR
PJPCKUN	Check for Unposted Journals	PJ	CR
PJPCOMPL	Compare Project Ledger to General Ledger	PJ	CR
PJPDISIN	View Invalid Pools in Project Ledger	PJ	CR
PJPEXCPT	Print Project Exception Report	PI	PJ
PJPFIXIN	Repair Invalid Pools in Project Ledger	PJ	CR
PJPPARMS	Change Period Report Parameters	PJ	CR
PJPPUR	Purge Project and Billing Information	CR	PJ
PJPUPPY	Update Prior Year History	PJ	CR
PJRBASIC	Print Project Master Report	PI	PJ
PJRFORM	Print Project Revenue and Billing Formulas	PI	PJ
PJRPAG	Print Project Account Group Setup Report	PI	PJ
PJRPOOL	Print Cost Pool Setup Report	PI	CR
PJRPLIS	Print Cost Pool Rates Report	PI	CR
PJRPWF	Print Project Work Force Report	PI	PJ
PJRSCTR	Print Service Center Setup Report	PI	CR
PJRSETUP	Print Project Setup Report	PI	PJ
SYMCFLA	Manage Application Conflicts	SY	SS
SYMCFLO	Manage Segregation of Duties Conflict Overrides	SY	SS
SYMCNFT	Manage Segregation of Duties Conflict Types	SY	SS
SYMGRP	Manage User Groups	SY	SS
SYMORGFN	Activate/Inactivate Organization Security by Module	SY	SS

App ID	Application Name	Old Module	New Module
SYMORGRP	Manage Organization Security Groups	SY	SS
SYMORPRF	Manage Organization Security Profiles	SY	SS
SYMRPTAS	Manage Archived Report Security Rights	SY	SS
SYMUSR	Manage Users	SY	SS
SYPCFLR	Identify Segregation of Duties Conflicts	SY	SS
SYPORGPF	Update Organization Security Profiles	SY	SS
SYQJSTAT	View Action and Report Status	SY	PM
SYREFFUR	Print Effective User Rights Report	SY	SS
SYRGRPR	Print User Group Rights Report	SY	SS
SYRUSR	Print User Report	SY	SS