Deltek.

Costpoint Enterprise Reporting Administrator Series:
Security Setup Checklist

Step	Checklist Item for Initial Setup	Work performed in	Status	Notes
1	Verify Org Security in Costpoint	Costpoint: Administration	☐	
2	Set up Org Security in Reports & Analytics Module	Costpoint: Administration	☐	
3	Have the CER license bundle count/mix available	This information is sent to you by the Cloud Team.	☐	
4	Verify the status of the CER licenses	Costpoint: Administration	☐	
5	Check the user account for Admin to make sure it has access to all functions	Costpoint: Administration	☐	
6	Determine the level(s) of security you want enabled for your system		☐	
7	Download the Security Template	Cloud Web Site: Technical Guides page	☐	
8	Check status of Model Security Enable/Disable	Costpoint: Reports & Analytics	☐	
9	Model Security setup • Organizational Security • Labor Suppression Security • Project Security	Costpoint: Reports & Analytics	☐	
10	Use the template to map users to licenses and desired capabilities	Security Template (Excel)	☐	
11	Configure Capability Security Assign Users to User Groups	Costpoint: Administration	☐	
12	Configure Object Security Assign Users to User Groups	Costpoint: Administration	☐	
13	Set up the Reporting Period	Costpoint Enterprise Report	☐	
14	Validate users access - Admin	Costpoint: Reports & Analytics	☐	
15	Test users have access to correct data - Key Stakeholders	Costpoint: Reports & Analytics	☐	