



**Deltek.**

CER Cloud  
Administrator  
User Account  
Setup/Verification

Costpoint Enterprise Reporting Administrator Series

## Costpoint Enterprise Reporting Administrator Series: CER Cloud Administrator User Account Setup/Verification

These steps should be completed by a Costpoint/CER Cloud Administrator for the Organization. After using the AD Manager Application to assign users to License Types, Users are available within the Costpoint Application itself.

This documents how to verify the Administration has been setup in the correct User Groups.

**NOTE:** Deltek has preinstalled the CER user groups within Costpoint that are needed for User Setup.

Follow the steps in the table below to verify the status of the Administrator in the user groups.

Step	Action																																								
1	Log in to Costpoint as the Administrator (Administrator account or CPSUPERUSER).																																								
2	Navigate to the Manage Users Application screen: <b>Admin &gt; Security &gt; System Security &gt; Manage Users</b>																																								
3	Query on the Administrator Account (ex: CPSUPERUSER) <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Company ID</th> <th>Default Taxable Entity ID</th> <th>Org Security Group ID</th> <th>Labor</th> <th>SSN</th> <th>Cost</th> <th>Price</th> <th>Company Name</th> <th>Org Security Group Name</th> <th>Taxable Entity Name</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>ALL</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>ControlCompany</td> <td></td> <td>ControlCo/No Transactions</td> </tr> <tr> <td>GB</td> <td>GB</td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>GreggBridge Architects</td> <td></td> <td>The GreggBridge Architects+EngineeringCo</td> </tr> <tr> <td>AK</td> <td>26-488746</td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>AK GLOBAL</td> <td></td> <td>AK GLOBAL</td> </tr> </tbody> </table> </div>	Company ID	Default Taxable Entity ID	Org Security Group ID	Labor	SSN	Cost	Price	Company Name	Org Security Group Name	Taxable Entity Name	1		ALL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ControlCompany		ControlCo/No Transactions	GB	GB		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	GreggBridge Architects		The GreggBridge Architects+EngineeringCo	AK	26-488746		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AK GLOBAL		AK GLOBAL
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4	Click on the subtask: <b>Assigned User Groups</b> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>User Group</th> <th>User Group Name</th> <th>Company</th> </tr> </thead> <tbody> <tr> <td>CER_ACCOUNT</td> <td>CER Accounting</td> <td>ALL</td> </tr> <tr> <td>CER_ADMIN</td> <td>CER Cloud Administrator</td> <td>ALL</td> </tr> <tr> <td>CER_HR</td> <td>CER HR</td> <td>ALL</td> </tr> <tr> <td>CER_MATERIALS</td> <td>CER Materials</td> <td>ALL</td> </tr> <tr> <td>CER_PEOPLE</td> <td>CER People</td> <td>ALL</td> </tr> <tr> <td>CER_PLAN_PROJ</td> <td>CER Planning (Projects)</td> <td>ALL</td> </tr> </tbody> </table> </div>	User Group	User Group Name	Company	CER_ACCOUNT	CER Accounting	ALL	CER_ADMIN	CER Cloud Administrator	ALL	CER_HR	CER HR	ALL	CER_MATERIALS	CER Materials	ALL	CER_PEOPLE	CER People	ALL	CER_PLAN_PROJ	CER Planning (Projects)	ALL																			
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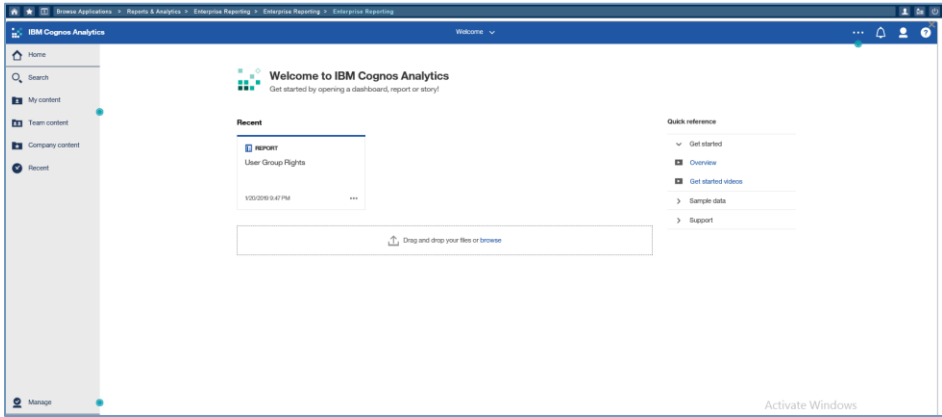
Step	Action	
5	<p>Assign these user groups to the CER Cloud Administrator using the steps that follow:</p> <p>There are two options that a CER Cloud Administrator can choose from to assign their User Group Rights.</p> <ol style="list-style-type: none"> <li>1. A CER Cloud Administrator has the option to choose the CER__ALL User Group, which will assign the Administrator access to all areas of Costpoint Enterprise Reporting.</li> <li>2. A CER Cloud Administrator also has the option to pick and choose the specific groups/areas that are applicable to their organization. A listing of all CER User Groups is provided below with a description of the basic rights. The full list of all individual User Group Rights can be found in the Security Planning Template. NOTE: If this option is chosen, it is not necessary to add all User Groups listed. (Example: If your company does not use Costpoint Materials, there is no need to add CER__MATERIALS as a User Group.)</li> </ol>	
	CER User Group	Description
	CER__ACCTG – CER Reports	Accounts Payable, Accounts Receivable, Basic Information, and General Ledger
	CER__ACCT_ALL_SECURE	Accounts Receivable; General Ledger; Company Content; Team Content: Accounts Receivable and General Ledger
	CER__ALL	All CER Object rights.
	CER__AR_SECURE	Accounts Receivable; Company Content; Team Content: Accounts Receivable
	CER__CONTRACTS	Contracts; Company Content; Team Content: Contracts Reporting
	CER__CP_ADMIN	Company Content; CER for Costpoint Administration
	CER__EXEC_SECURE	Company Content; Team Content: Accounts Receivable, Contracts Reporting, General Ledger, Project Reporting
	CER__GL_SECURE	General Ledger; Company Content; Team Content: General Ledger
	CER__HR – CER Reports	Basic Information; Costpoint Enterprise Reporting for HR and Payroll
	CER__MATERIALS	Company Content; CER Reports: Basic Information, Drill Thru Only, Procurement, and Purchasing; CER Reporting for Project Manufacturing
	CER__PEOPLE	Company Content; CER Reports: Basic Information; CER Reporting for Shop Floor Time
	CER__PLAN_PROJ	Planning; Company Content; CER for Budgeting and Planning; Team Content: Project Planning Analysis, Project Planning Reporting
	CER__PLAN_PRJ_SECURE	Planning; Company Content; Team Content: Project Planning Analysis, Project Planning Reporting
	CER__PM_MGR	Accounts Receivable; Planning; Projects; Team Content: Accounts Receivable, Project Planning Analysis, Project Planning Reporting
	CER__PROJECTS	Projects; Company Content; CER Reports: Basic Information, Billing, Projects, TESS; Team Content: Project Analysis, Time and Expense TESS
	CER__PROJ_SECURE	Projects; Company Content; Team Content: Project Analysis, Project Reporting
CER__TE – CER	Reports: Basic Information, TESS Company Content; Team Content: Time and Expense TESS	



Step	Action
6	Click: <b>New</b>
7	Click on the magnifying glass.
8	Locate the CER group that should be added. <b>NOTE:</b> If you type the group name in they are each set up with a double underscore.
9	In the field Company, <b>Assign the Company</b>
10	If necessary, to add additional groups, repeat steps 7-10
11	When finished, click: <b>Save</b>

## Administrator Account Verification

As the CER Cloud Administrator, it is important to test your access to the Costpoint Enterprise Reporting domain.

Step	Action
1	Log out of the Costpoint System to make sure that any changes potentially made have taken effect.
2	Log back into Costpoint
3	<p>Navigate to: <b>Reports &amp; Analytics &gt; Enterprise Reporting &gt; Enterprise Report &gt; Enterprise Reporting.</b></p> <p><b>NOTE:</b> You should now be able to navigate to the Welcome to Costpoint Enterprise Reporting page. If this menu item, does not appear it's because rights to the ER module rights are not associated with your account. Repeat the steps above ensuring all accesses have been granted.</p> 
4	Next, open the Team Content folder to ensure that you have access to the appropriate content. You may have all these folders or a subset. If this folder is empty check the User Group settings for your account. You should be assigned to one or more object security groups (CER__ACCTG, CER__PROJECTS, CER__HR, etc.). Also note the Manage icon in the lower left – this identifies that you have admin capabilities within CER. If this is missing, check that CER__ADMIN is assigned to your account.
5	Lastly, double check that you can navigate to the following menu items: Manage CER Settings and Manage Current Reporting Period. If not available, you need review the steps for assigning the DC module and BIMSETTINGS application rights. These rights can be added to the CER__ADMIN user group or directly to your user account.