Deltek®

CER Validation and Testing

Costpoint Enterprise Reporting Administrator Series

# Costpoint Enterprise Reporting Administrator Series: CER Validation and Testing

Validation should be completed by a CER Cloud Administrator and testing should be completed by a small selection of CER Users.

Now that CER security has been enabled, users have been assigned to their specific User Groups via Capability Security and Object Security, and the Current Reporting Period has been setup, it is necessary to validate and test the users. Be sure to have access to the Security Planning Template filled out during the security planning and enabling phase. You may have to reference this to make updates.

Follow the steps in the table below to validate and test user access to content/data.

Step	Action
1	Access Costpoint and log-in as the CPSUPERUSER or the Administrator
2	To begin the validation, navigate to Costpoint Enterprise Reporting: **Reports & Analytics > Enterprise Reporting > Enterprise Reporting > Enterprise Reporting** **Result:** The landing page displays: **Welcome to IBM Cognos Analytics**
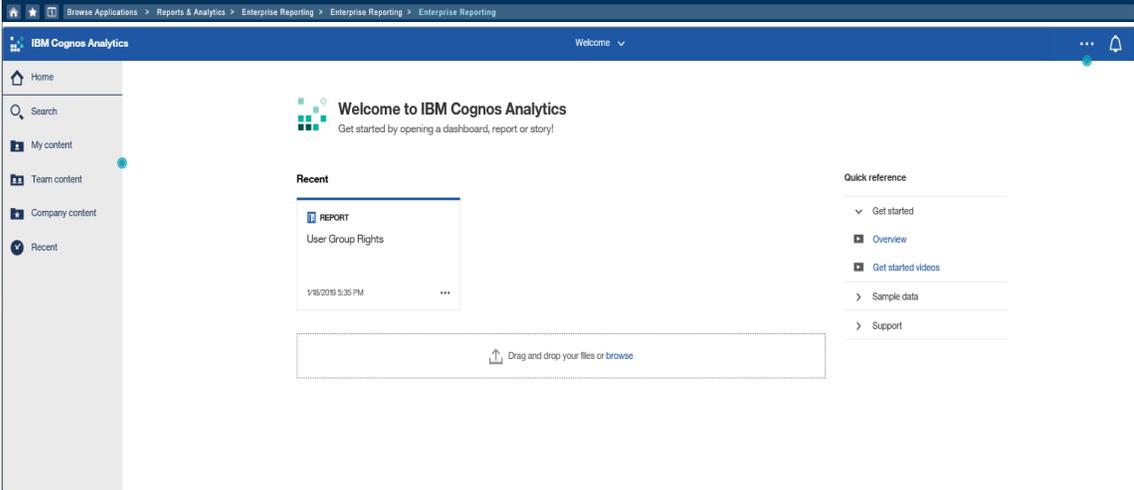
Step	Action
3	Navigate to the User Group Rights Report: **Team Content > Costpoint Enterprise Reporting for Costpoint Administration > Security > User Group Rights Report**
4	If prompted, select your data source connection. **NOTE**: Your data source will not have the same name as the graphic below. **Results:** With the correct data source selected, the **User Groups Rights General Options** display.
5	Search on the User Groups keywords that begin with CER__ to see all users associated with the CER Groups **NOTE:** These were set up in Capability and Object Security.
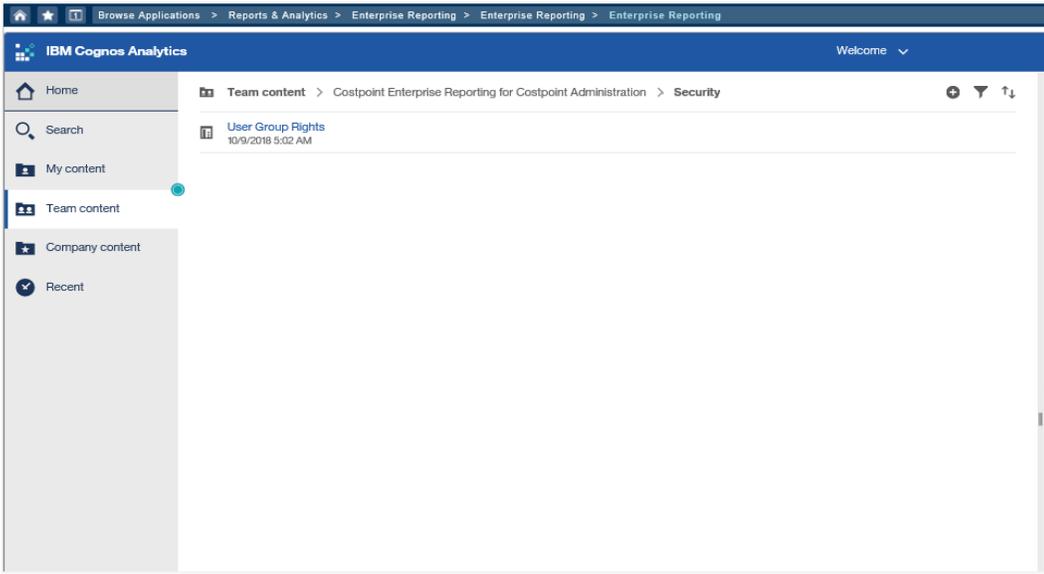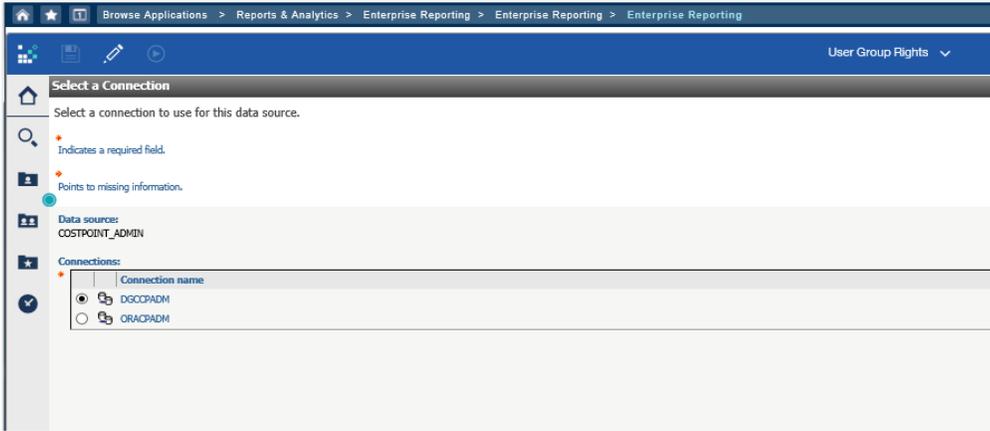
Step	Action
6	In the area Results, select all the user types you want to see on the report.
7	Click the button: **Insert** **Result**: The selected items display in the area **Choice**.
8	In the lower right, click the button: **Run Report** **Result:** The report displays with two or three tabs: Cover Page (if that option was chosen) User Group Rights and User Group Users. Verify that your User Group Users appear as they were setup using the Security Planning Template.
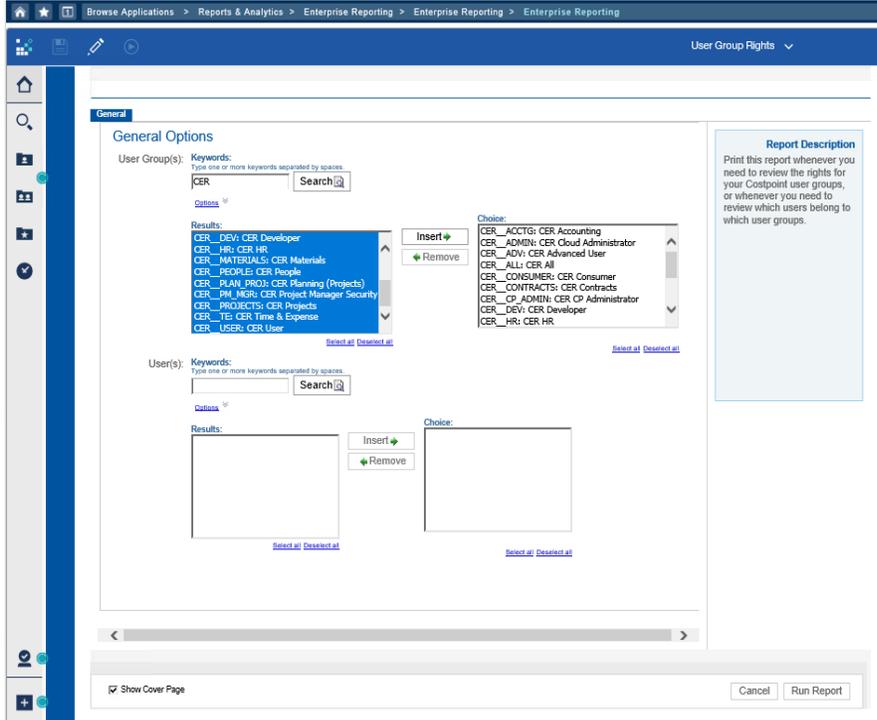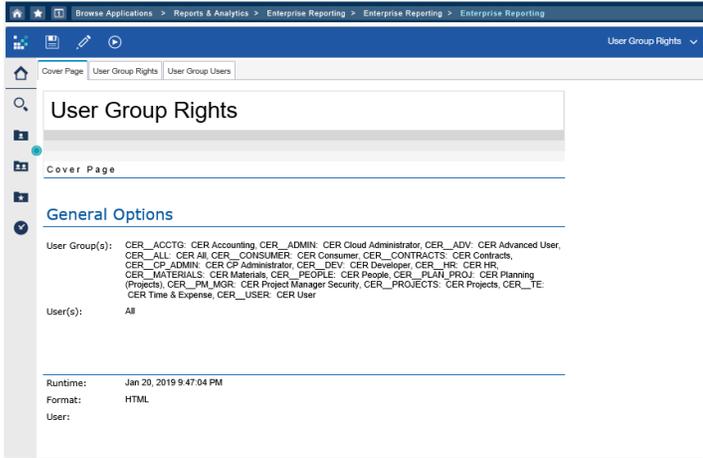
Step	Action
9	To validate the User Group Rights, click the tab: User Group Rights
10	To validate the User Group Users, click the tab: **User Group Users**
11	Refer to the Security Template for Capability and Object Security. Make any adjustments that may be required.
12	You have now completed the validation process.
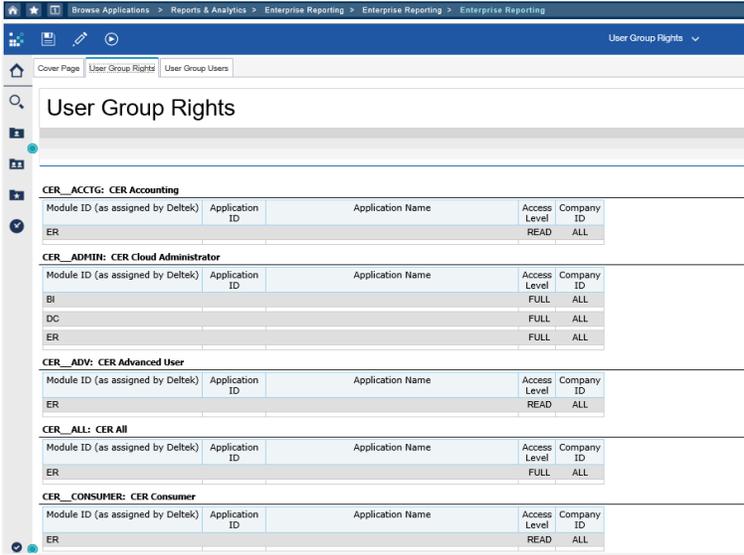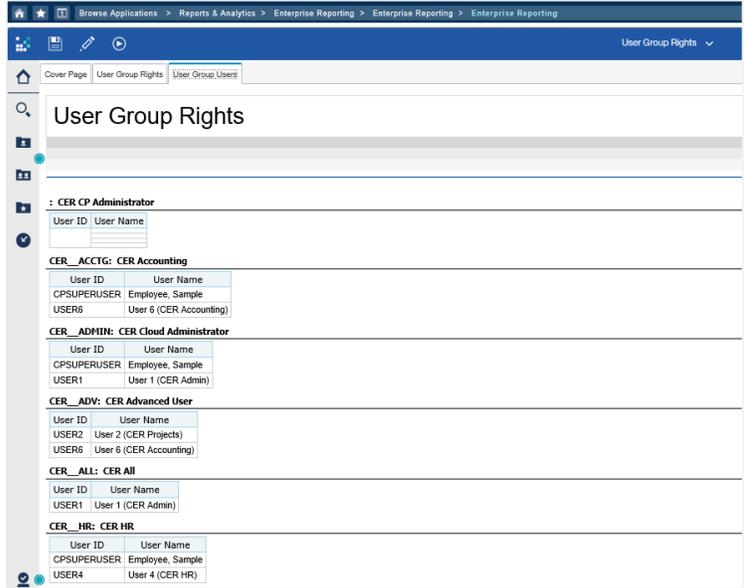
CER ROLE TESTING

Testing will need to be completed by a few key stakeholders.
Prior to testing, each user should:

- Access their own Costpoint account
- Review the Costpoint Enterprise Reporting: Overview Click-Thru found in the Help Menu:
  https://help.deltek.com/Product/Costpoint/Documentation/Cloud/Costpoint_Videos.html

Once in the Costpoint Enterprise Reporting Tool have them check for the following:

- Rights that have been granted to specific areas are available
- Run some of the standard reports from their specific area and validate the results.
- Schedule Reports
- View Dashboards if they have access to Projects and Planning
- Save a Report to the My Content folder

Testing will be completed once users have verified the above and this will complete the basic setup of Costpoint Enterprise Reporting.

Watch the navigation video (Help Menu > Video) to see how to access, run, and schedule reports.