



Deltek[®] Costpoint >

Planning Series

Quick Reference Guide

Click on the topics to go directly to that page.

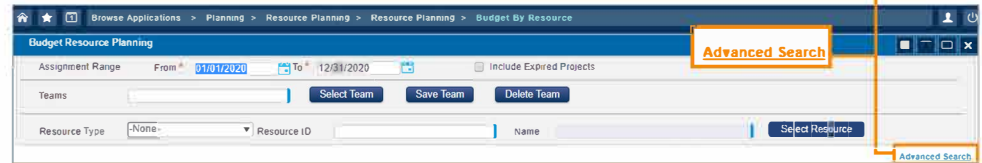
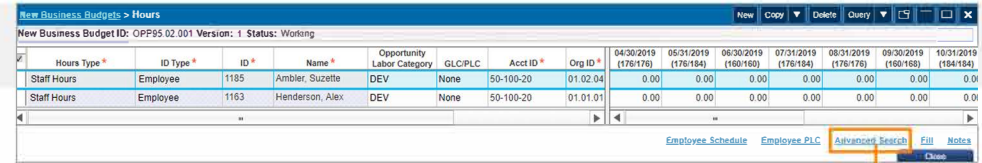
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Costpoint 8 Planning Series: Advanced Search Improvements



Where in **Planning** can you find the **Advanced Search** application?

- 01 Access:** New Business Budgeting > Actions/Processing > New Business Budgets.
In a Working status budget, go to the **'Hours'** subtask, then **Advanced Search** subtask.
- 02 Access:** Project Budgeting > Budget/EAC Processing > Project Budgets/EACs.
In a Working Status budget, go to either **Staff Hours, Subcontractor Hours** or **Consultant Hours**, then the **Advanced Search** subtask as above.
- 03 Access:** Resource Planning > Resource Planning > Budget by Resource.
Enter the **Assignment Range** then the subtask **Advanced Search**.

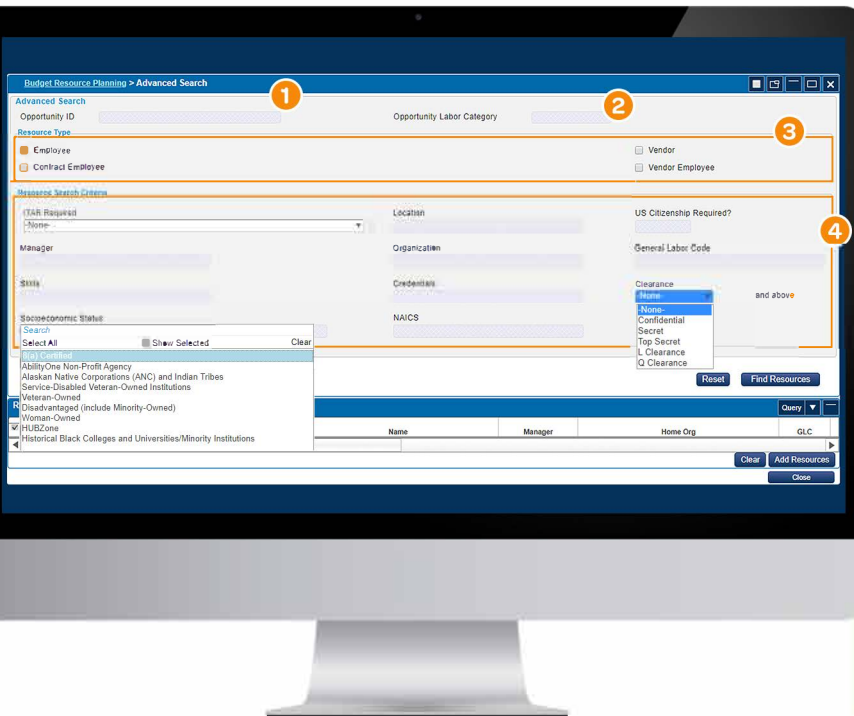


Advanced Search Parameters

- 1. Opportunity ID** - If accessing Advanced Search from New Business, if a New Business ID is linked to an Opportunity, the Opportunity will show in this field. If accessing Advanced Search from Budget by Resource, you can select an Opportunity ID in order to use the associated Labor Code criteria for your resource search.
- 2. Opportunity Labor Category** - If linked to an Opportunity ID, this Lookup field will show Opportunity Labor Codes set up on the Contract Opportunity. When you select an Opportunity Labor Code, the Resource Search Criteria are automatically populated from the Opportunity Labor Code criteria.
- 3. Resource Type** - Select one or multiple from Employee, Contract Employee, Vendor or Vendor Employee. Note that each Resource Type has applicable Resource Search Criteria. Those not applicable remain grayed out.
- 4. Resource Search Criteria (available by Resource Type)**
 - Employee and Contract Employee** - ITAR Required, Manager, Skills, Location, Organization, Credentials, US Citizenship Required, General Labor Code and Clearance.
 - Vendor Employee** - ITAR Required, Manager, Skills, Location, US Citizenship Required and General Labor Code.
 - Vendor** - Socioeconomic Status and NAICS

4. Resource Search Criteria (selections)

- ITAR Required** – defaults to None. Choices are – 'Not Applicable', 'US Person Authorized for ITAR', 'Foreign Person with US Dept of State Authorization/Special Exemption' or 'Not Authorized'.
- Manager** – multi-selection, with query condition 'Or', from employees assigned as Manager in the People Domain.
- Skills** – multi-selection, with query condition 'And', from Manage Skill Codes in the People Domain.
- Socioeconomic Status** – multi-selection with a query condition of 'Or'.
- Location** – multi-selection, with query condition 'Or', from the Administration Domain.
- Home Organization** – multi-selection, with query condition 'Or', from the General Ledger.
- Credentials** – multi-selection, with query condition 'And', from the People Domain.
- NAICS** – multi-selection, with query condition 'And', from the Contracts Domain.
- US Citizenship Required?** – Defaults to 'None'. Selection is 'Yes' or 'No'.
- General Labor Code** – multi-selection, with query condition 'Or', from the Accounting Domain.
- Clearance** – Defaults to 'None'. Selection is 'and above'.



Advanced Search Improvements



Advanced Search - Find Resources

When the required parameters have been completed, click on **Find Resources**. The result set in the Resources will show a **% Match** of the resource to the criteria selected and relevant to the **Resource Type**. The % Match in the result set:

Will take into account whether the Search Criteria has a query condition of 'And' or 'Or'. For example in Organization the query condition is 'Or', if there is a multi-selection made in Organization, if a resource matches any one of those selections, the match is 100%. Conversely, if the query condition is 'And', as in Skills, and there is a multi-selection of Skills, the resource has to match all of the skills selected to be a 100% match. Anything less, say 2 out of 3 skills the match will be 66%.

% match calculation when selecting one or multiple Resource Types from Employee, Contract Employee, Vendor or Vendor Employee. Note that each Resource Type has applicable Resource Search Criteria. Those not applicable remain grayed out. However, when multiple Resource Types are selected, the applicable criteria for each Resource Type are available. But some criteria shown will not be applicable for each Resource Type selected. Therefore, when the % match is calculated it will only include those criteria applicable to the resource type returned in the result set.

% Match	ID Type	ID	Name	Manager	Home Org	GLC	Credentials	Location	Skills	Clearance	ITAR
66.6667%	Employee	1147	Kelly, Larry						CAD, COMM		
33.3333%	Employee	1202	Manos, Janeth						AR		
33.3333%	Employee	1199	Kail, Olin						AR		
33.3333%	Employee	1203	Gomes, Bobbi						AR		
33.3333%	Employee	1196	Doris, Yi						AR		



Adding Resources

You can multiselect resources in the result set and click Add Resources.

- 01** In **Budget by Resource**, close **Advanced Search** to go back to view **Selected Resources** now populated with the selected resources.
- 02** In **Project Budget/EAC** the resources populate the budget.
- 03** In **New Business Budgets** you will receive a message that the resources have populated the **Hours** subtask in the budget but you need to select the **Hours Type** for each budget row populated.

Message(s)

Message(s)

In order to proceed please select hours type for the added resources.

 Browse Applications

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Browse Applications

Type here to search applications

+/-
x/=

Accounting

📝

Contracts

📁

Planning

Organization Budgeting

New Business Budgeting

Project Budgeting

Resource Planning

Administration

System Security

Administration Reports

Administration Controls

Administration Utilities

User Security Log (MAU9)

User Security Review (MAU10)

 **Note:** These reports are only accessible to the Administrator.

 User Security Log

 Planning > Administration > Administration Reports > User Security Log (MAU9)

User Security Log (MAU9)							Form	Query	⌵	⌵	⌵	⌵
☒	User Name	Function	Task	Security Values	Modifier Name	Date Changed						
	Zacchaeues, Steven R	ADDED_PROJ_MNGRS	DELETE	PROJ_ID: AADAM	Dimetrov, Alexei A	10/14/2018 09:48:47 PM						
	Zales, Joseph I	ADDED_PROJ_MNGRS	DELETE	PROJ_ID: ABBEE	Dimetrov, Alexei A	10/14/2018 09:37:33 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	DELETE	PROJ_ID: ABBEE	Dimetrov, Alexei A	10/14/2018 08:21:05 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	ADD	PROJ_ID: ABBEE.1.01	Dimetrov, Alexei A	10/14/2018 07:47:39 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	ADD	PROJ_ID: ABBEE	Dimetrov, Alexei A	10/14/2018 07:45:10 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	ADD	PROJ_ID: ABBEE.1	Dimetrov, Alexei A	10/14/2018 07:45:10 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	DELETE	PROJ_ID: ABBEE.1.01	Dimetrov, Alexei A	10/14/2018 07:41:11 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	ADD	PROJ_ID: ABBEE.1.01	Dimetrov, Alexei A	10/14/2018 07:40:52 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	DELETE	PROJ_ID: ABBEE.1	Dimetrov, Alexei A	10/14/2018 07:40:40 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	ADD	PROJ_ID: ABBEE.1	Dimetrov, Alexei A	10/14/2018 07:40:17 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	DELETE	PROJ_ID: ABBEE	Dimetrov, Alexei A	10/14/2018 07:39:55 PM						
	--Deleted User--	ADDED_PROJ_MNGRS	ADD	PROJ_ID: ABBEE	Dimetrov, Alexei A	10/14/2018 07:38:40 PM						

 **Note:** This report is a log of who made “Security” related changes in the system, and the changes made.



User Security Review



Planning > Administration > Administration Reports > User Security Review (MAU10)

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Browse Applications > Planning > Administration > Administration Reports > User Security Review (MAU10)

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User Security Review (MAU10)

Form Query ▾ ⌵ □ ✕

☒	User ID	Name	
	STD_ACCT_MGR	ACCOUNTING MANAGER	▲
	STD_AP_CLRK	ACCOUNTS PAYABLE CLERK	■
	STD_AP_MGR	ACCOUNTS PAYABLE MANAGER	
	STD_AR_CLRK	ACCOUNTS RECEIVABLE CLERK	
	STD_AR_MGR	ACCOUNTS RECEIVABLE MANAGER	
	LEARNER	ALEXANDER, DAMIEN D	
	LEARNER1	ALEXANDER, DAMIEN D	
	DAMIEN	ALEXANDER, DAMIEN D	
	AMIE	ALEXANDER, DAMIEN D	▼

[Access List](#)

User Security Review (MAU10) > Access List

Form Query ▾ ⌵ □ ✕

☒	Project ID	Name	Access Source	
	ABBEE	AdvancedAerospaceDefense	Org Rights Based	▲
	ADMIN	General & Administrative	Org Rights Based	
	AFCPR	AFC project 1	Org Rights Based	
	AGILE	AGILE Tactical DefenseSys	Org Rights Based	■
	ALLYX	The ALLYX Project	Org Rights Based	
	AP001	TOP LEVEL PROJECT	Org Rights Based	
	AP002	TOP LEVEL PROJECT	Org Rights Based	
	AQUAA	Aquatic Environmental	Org Rights Based	
	ASPIN	AmericanSPaceInitiative	Org Rights Based	▼

Close



Note: Use this screen to review users rights to specific applications within the Organization and Project Budgets as defined in the User Setup and Reporting Rights setting.