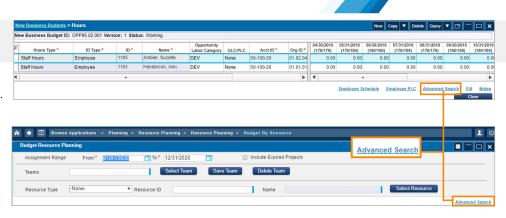Costpoint 8 Planning Series:
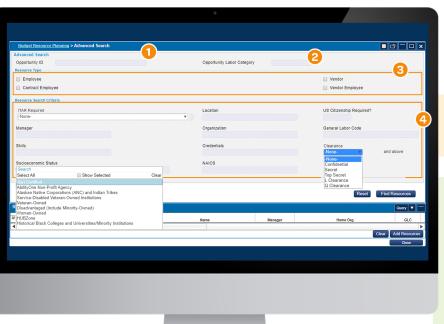# Advanced Search Improvements

Deltek.

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'.

Costpoint 8 Planning Series:
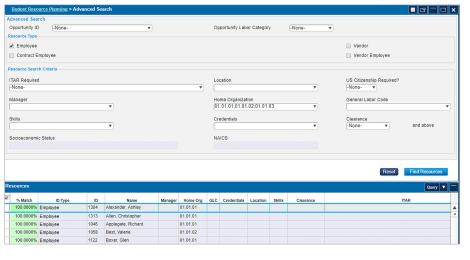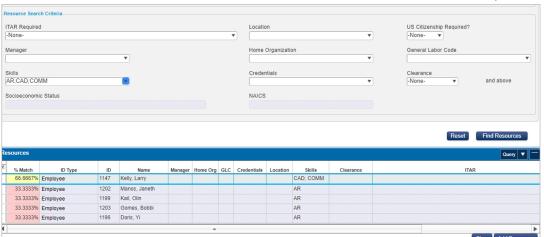# Advanced Search Improvements

Deltek.

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.

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.