# Getting the Most out of Deltek Costpoint BI Dashboards and Reports

April 17, 2024

Deltek

Lexellblue consulting

# Speakers


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Niki assists in the design and development of Costpoint BI at Deltek.  She brings 20+ years' experience with Costpoint and Cognos software.


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Lowell brings 20 years with Cognos and Costpoint ranging from requirements gathering, development, process improvement, system design, life cycle development, staff development, training, and post-implementation support.

# Agenda

- Costpoint BI Overview
- Costpoint BI Dashboard Demonstration
- Key Resources available
- Implementation and Best Practices
  - Report/Dashboard development process
  - Leveraging BI Burst and Schedule functionality
  - Security options in Costpoint BI
- Q & A

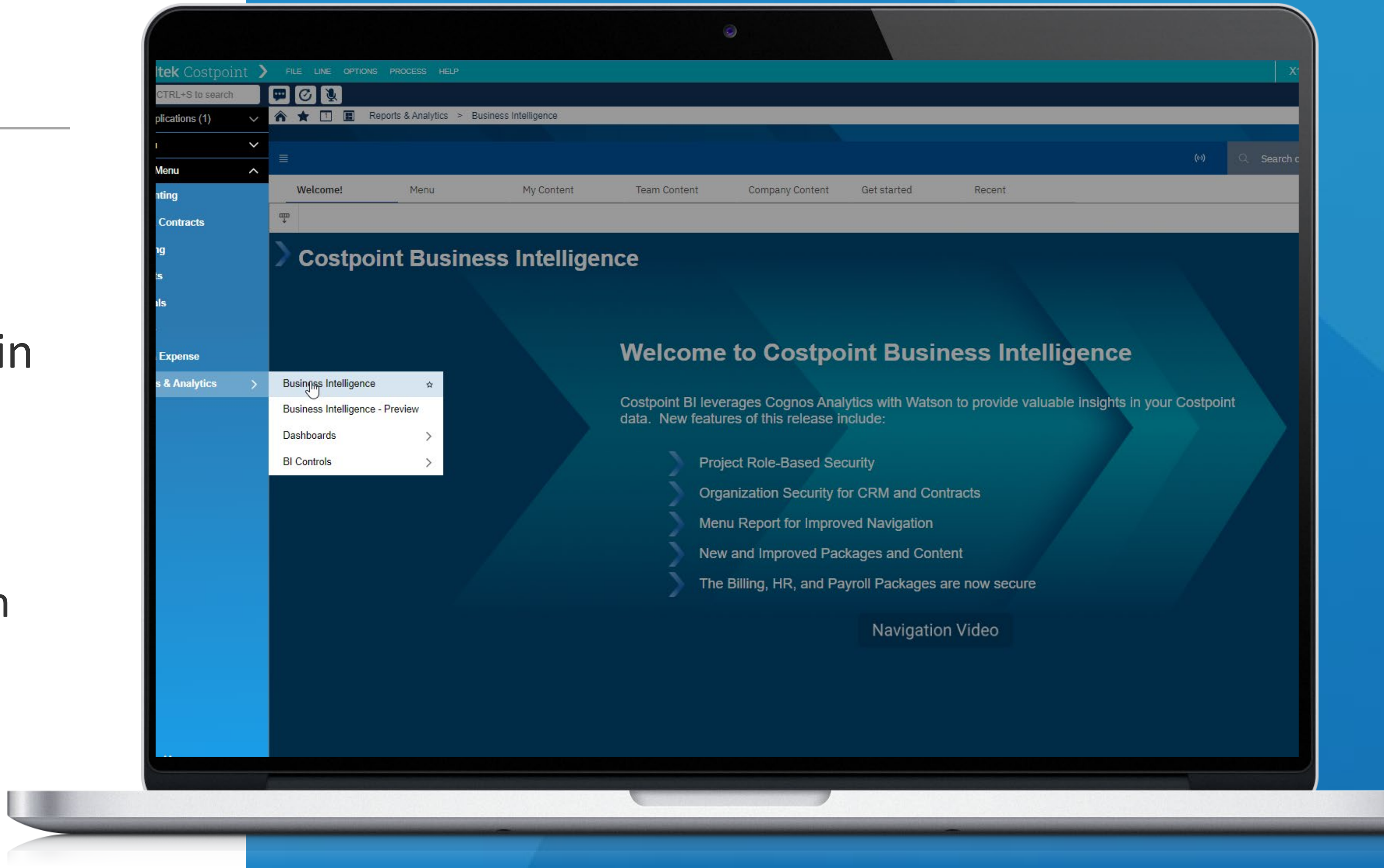
v8.2.9

# What is Costpoint Business Intelligence?

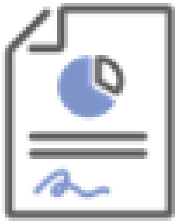
- An application, within the Costpoint Reports & Analytics domain, that is used to aid in decision making and troubleshooting by presenting data in a consumable format.

- It is powered by the underlying IBM software, Cognos Analytics with Watson v11.2.4.

- This is software which Deltek rebrands and embeds within Costpoint for easy access and to supplement Costpoint reports.



# Costpoint Business Intelligence Tools



## Reporting

A powerful web-based authoring tool to aid in building reports.

## Dashboards

An easy to learn, self-service tool for creating highly interactive visualizations for exploring your data.

## Alerts (Event Studio)

Monitors conditions in your data and triggers an action when that condition is met.

## Data Modeling

Provides the business rules and underlying relationships of your data that support the creation of reporting, dashboards, stories, explorations and alerts.

## Stories & Explorations

Stories allow you to present your dashboard in a narrative form. Explorations use AI to provide insights into relationships between data elements.

# Notable Features of Costpoint BI

## Deltek Library

Includes out-of-the-box data models, reports and dashboards to use with your Costpoint data.

## Integrated and Robust Security

Supports basic to very complex security requirements. Integrated with Costpoint for reduced maintenance.

## Self-Service BI

Supports basic users that are simply viewing reports and dashboards to highly advanced users creating their own BI content.

## Scheduling, Subscribing and Bursting capabilities

End users can subscribe to favorite reports and have them delivered straight to their email in desired format (pdf, excel, csv, etc)

## Interactive Viewer

Ability to personalize report output by grouping, subtotaling, sorting, filtering data without having to be a report author.

## Upload Excel Data

Ability to upload excel files to combine with your Costpoint data.

NOTE

This listing is representative of Deltek's out-of box assets (as of v8.2.9) but not comprehensive. Excludes SOX reports, SMART AI and the data models/packages.

# Costpoint Business Intelligence Library

**Accounts Payable**
- 1099 Exceptions
- Corpay Payments
- Corpay Portal Vendor Listing
- Vendor Employee
- Vendor History by EEOC Classification
- Vendor Master (Form)
- Vendor Master (List )

**Accounts Receivable**
- Accounts Receivable Aging
- Customer Master Information

**BI Audit**
- BI Content Trended Usage
- BI Content by User Report
- Summary BI Report Usage
- User Login/Logoff Report

**Billing**
- Accounts Receivable Aging
- Aged Open Billing Detail
- Milestone Invoice
- Pre-Bill Report
- Standard Invoice with Backup
- Unbilled Analysis
- Unposted Invoice
- Zero Rate Billing Exception Report

**Costpoint Administration**
- Data Dictionary
- Effective User Rights
- Homepage Report
- Menu
- User Group Rights

**CRM & Contracts**
- Contract Backlog Report
- Contract Brief
- Contract Drill Thru
- Contract FAR/Supplement Report
- Contract Vehicle Report
- Contracts Dashboard
- Customer Inquiry
- OCI Drill Thru
- Opportunity Current Pipeline Report
- Opportunity Dashboard
- Opportunity Days Open Report
- Opportunity Drill Thru
- Opportunity Win/Loss Report
- Project Drill Thru
- Subcontract Drill Thru

**Employee**
- Attrition and Retention
- Employee Basic Information
- Employee Information
- New Hire / Termination

**Executive**
- Accounts Receivable Aging
- Aged Open Billing Detail
- Attrition and Retention
- Balance Sheet
- Cash Forecast
- Contract Backlog Report
- Contract Drill
- Executive Dashboard
- Expense Drill
- Income Statement
- Labor Utilization
- New Hire / Termination
- Opportunity Current Pipeline Report
- Opportunity Win/Loss Report
- Org Mgr CP Performance Analytics
- Revenue Forecast
- Trended Income Statement
- Unbilled Analysis

**Expense**
- Expense Charge Activity Report
- Expense Resource Activity Report

**Fixed Assets**
- Fixed Asset Report

**General Ledger**
- Account List
- Balance Sheet
- Cash Forecast
- General Ledger Detail
- Income Statement
- Organization List
- Reorganization Structure
- Trended Income Statement
- Trial Balance

**Human Resources**
- EEO-1 Report
- Employee Benefits Profile
- VETS-4212

**Incurred Cost Submission**
- Schedule A
- Schedule B
- Schedule C
- Schedule D
- Schedule E
- Schedule G
- Schedule H
- Schedule H-1
- Schedule I
- Schedule J
- Schedule K
- Schedule L
- Schedule O

**Labor**
- Employee Labor
- Labor Utilization
- Labor Utilization Forecast

**Manufacturing**
- Audit Log
- BOM Component Shortage
- Barcoded MO Routing Traveler
- ECN Impact to MOs - Drill Thru
- In-Shop Date vs Planned In-Shop Date - Drill Thru
- Indented Bills of Material
- MO Build-To Inv Abbrev
- MO Component Shortage
- MO Component Shortage - Drill Thru
- MO Pick List
- MO Production Status
- MO Production Status Detail - Drill Thru
- MRP Message Report
- Manufacturing Dashboard
- Operation Status Active - Drill Thru
- Operation Status Not Scheduled - Drill Thru
- Operation Status Upcoming - Drill Thru
- Release Date vs Planned Release - Drill Thru
- Summarized Bills of Material

**Materials**
- Audit Log
- Container Content Labels
- Customer Returns
- Goods List
- Indented Bills of Material
- Inventory Accuracy - Drill Thru
- Inventory Dashboard
- Item Vendors
- Lead Time Audit
- Lead Time Import Extraction
- Negative Net Available - Drill Thru
- Obsolete Inventory- Drill Thru
- Parts List
- Sales Order Status
- Services List

**Payroll**
- Employee Earnings
- Requisition Detail - Drill Thru
- Requisitions
- Requisitions Pending PO Conversion
- Unposted Check Detail Drill Thru
- Vendor Exclusion Report
- Voucher Line Detail Drill Thru

**Projects**
- Accounts Receivable Aging
- Aged Open Billing Detail
- Burdened Labor and ODCs
- Labor Detail
- Org Mgr CP Performance Analytics
- PLC Exception Report for Missing Rates

**Planning**
- BnP PSR Trending Analysis
- Burdened Labor Costs by Project
- G/L Detail - Drill Thru
- Labor Detail - Drill Thru
- Labor Utilization Forecast
- Labor Variance by PLC
- Org Mgr Planning Performance Analytics
- PM Planning Performance Analytics
- PSR Report Template
- Pending Charges Detail Report
- Planning Revenue Summary Report Template
- Project Labor Hours Status
- Project Report with Labor Detail
- Project Status Cost Summary
- Project Subcontractor Status
- Real Time Project Status Report
- Revenue Forecast
- T&M Profitability

**Procurement**
- Approved Requisitions - Drill Thru
- Buyer Requisition Worksheet
- Days In-Approval (for Header Approval)
- Days In-Approval (for Line Approval)
- PO Commitments Detail
- PO Header and Line Detail - Drill Thru
- PO Payment & Remaining Balance Report
- Posted Check Detail Drill Thru
- Procurement Dashboard (Header Level Approval)
- Procurement Dashboard (Line Level Approval)
- Purchase Order
- Purchase Order Amount by Status - Drill Thru

- Project Master (List)
- Project Percent Complete Report
- Project Revenue Summary with Backlog
- Project Status Report
- Project Work Force
- Revenue Summary Report Template
- TE - Charge Activity Report
- TE - Expense Charge Activity Report
- TE - Work Hours by Day by Project
- Unbilled Analysis

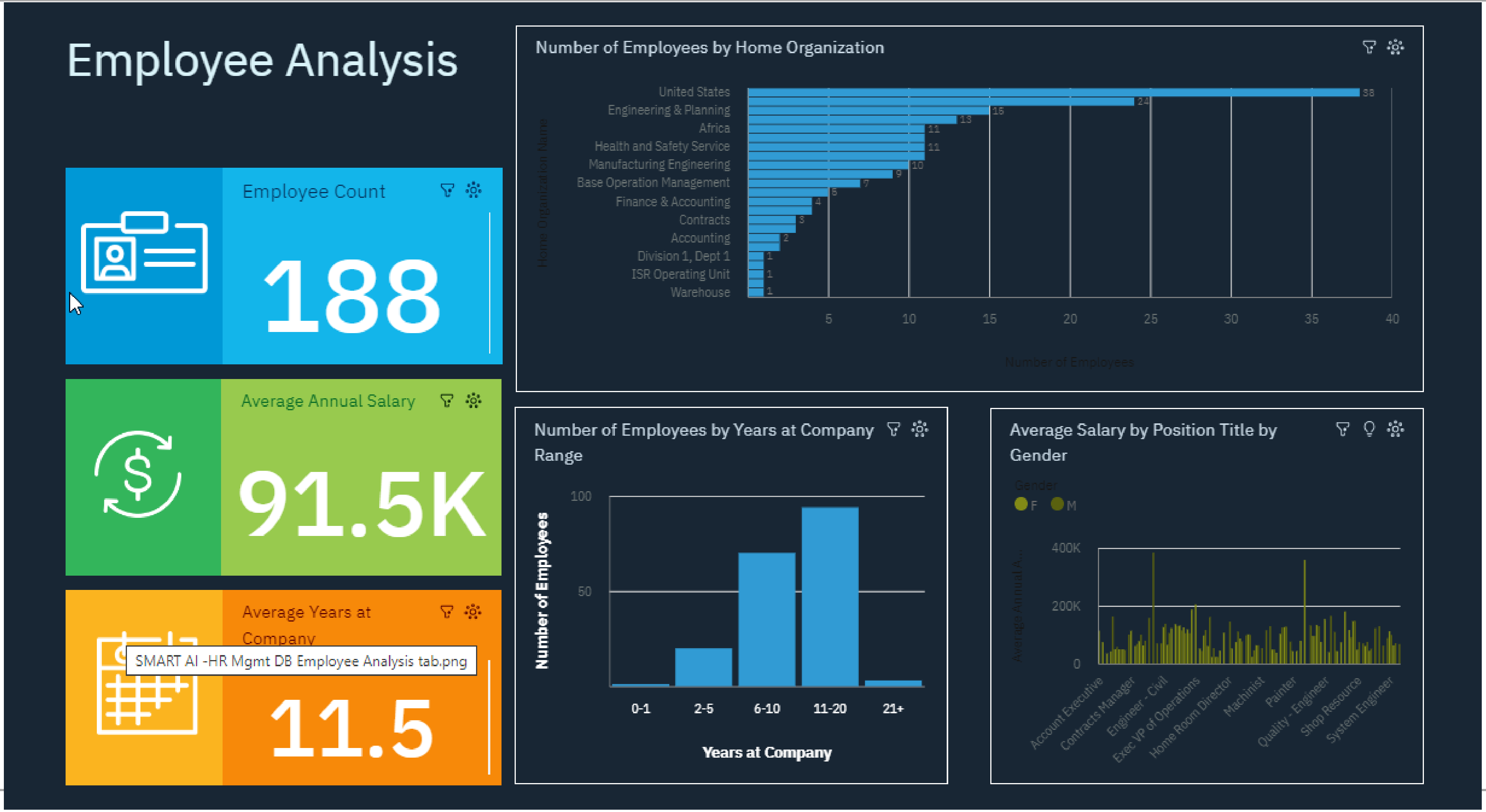
**Shop Floor Time**
- Costpoint Shop Floor Time Reconciliation Report

**Subcontractor Management**
- Subcontract Status Report
- Work Assignment Charge Detail Report

**Time**
- Charge Activity Report
- Resource Activity Report
- Work Hours by Day by Project
- Work Hours by Day by Resource

Available now in v8.1

# Spotlight– HR Management Dashboard



New in v8.2

# Spotlight– Project Health Report

- Includes insight into various aspects of project for the Current Reporting Period in a single report.
- Intended to be used with Project Role Security for best performance.
- Filters to refine data.
- Includes drill links to launch reports with supporting details from summary boxes and table object.

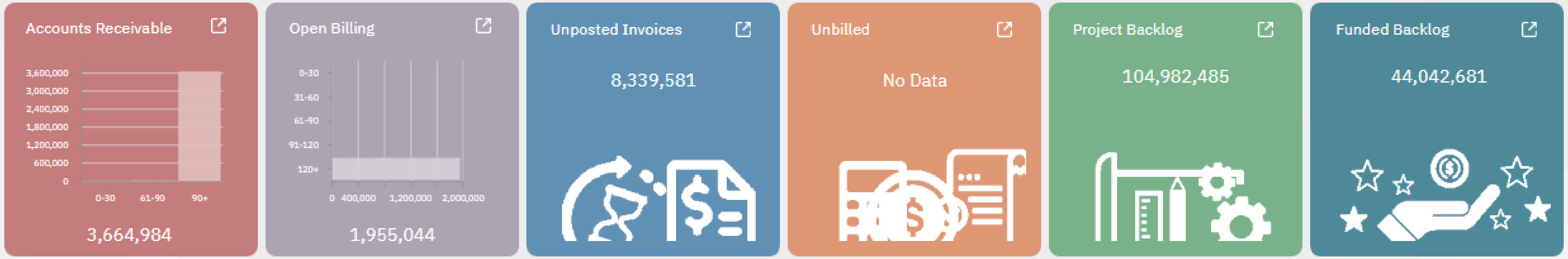
Role Description
Role Description
---------------------------
Backup Project Manager
Project Manager

Inception to Date
Period to Date

Target
Actual
Actual/Target

the period ending Jun-30-2019

*If you don't have access to all levels of a project based on your security, the Backlog amounts you see will be overstated while the % Complete value will be understated. For more information, please see the Team Content Guide.*




| Project | Start Date | End Date | Project Value | Funded Value | Revenue | Award Fee | Direct Labor | Direct Non-Labor | Gross Profit | Gross Profit % | Indirect Expenses | Profit | Profit % | % Complete |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 10105 - Cybersecurity Diag & Mitg | Apr 1, 2012 | Dec 31, 2021 | 6,312,233.00 | 6,200,000.00 | 4,791,749.69 | 0.00 | 1,628,497.86 | 1,180,656.26 | 1,982,595.57 | 41% | 1,754,417.00 | 228,178.57 | 5% | 76% |
| 10110 - Defense HC Mgmt Sys Modtn | May 1, 2012 | Jun 30, 2014 | 4,000,000.00 | 4,000,000.00 | 3,506,844.52 | 0.00 | 892,577.02 | 1,207,256.97 | 1,407,010.53 | 40% | 1,088,740.53 | 318,270.00 | 9% | 88% |
| 10115 - Base Rec Center | Feb 16, 2017 | Feb 28, 2018 | 1,450,000.00 | 1,450,000.00 | 1,470,624.94 | 0.00 | 651,777.82 | 1,500.00 | 817,347.12 | 56% | 770,512.78 | 46,834.34 | 3% | 101% |
| 10120 - Construction and Design | May 1, 2012 | Dec 31, 2016 | 13,205,000.00 | 13,205,000.00 | 12,290,873.66 | 0.00 | 3,704,898.94 | 3,929,638.64 | 4,656,336.08 | 38% | 3,858,945.25 | 797,390.83 | 6% | 93% |
| 10140 - DHA Network Review | May 1, 2012 | Jun 30, 2014 | 2,400,000.00 | 2,000,000.00 | 1,374,962.00 | 0.00 | 267,304.23 | 575,478.64 | 532,179.13 | 39% | 290,118.22 | 242,060.91 | 18% | 57% |
| 10150 - Surveillance Services | Jun 1, 2012 | Nov 30, 2015 | 1,000,000.00 | 400,000.00 | 898,273.92 | 0.00 | 218,677.87 | 357,263.67 | 322,332.38 | 36% | 249,448.26 | 72,884.12 | 8% | 90% |
| 10160 - Airborne Early Warn Radar | Jun 1, 2012 | Aug 31, 2015 | 20,650,000.00 | 16,950,000.00 | 14,914,213.00 | 0.00 | 3,611,810.78 | 5,786,390.24 | 5,516,011.98 | 37% | 4,411,615.53 | 1,104,396.45 | 7% | 72% |
| 10180 - Health Svcs Policy Devel | Jun 1, 2012 | Dec 31, 2014 | 800,000.00 | 800,000.00 | 800,000.00 | 0.00 | 382,773.94 | 0.00 | 417,226.06 | 52% | 403,345.70 | 13,880.36 | 2% | 100% |
| 10200 - Global Cmnd Satelite Supt | Jun 1, 2012 | Nov 30, 2015 | 5,300,000.00 | 5,300,000.00 | 4,928,132.05 | 0.00 | 1,034,588.04 | 2,619,080.80 | 1,274,463.21 | 26% | 1,297,049.97 | (22,586.76) | 0% | 93% |
| 10210 - Mesquite Solar Powr Plant | Jun 1, 2012 | Apr 30, 2015 | 2,000,000.00 | 2,000,000.00 | 2,000,000.00 | 0.00 | 621,670.33 | 0.00 | 1,378,329.67 | 69% | 611,282.52 | 767,047.15 | 38% | 100% |
| 10215 - SE2020 SIR2 FO-TO2 | Mar 1, 2018 | Feb 29, 2020 | 3,000,000.00 | 3,000,000.00 | 1,353,048.66 | 0.00 | 516,038.10 | 1,216.50 | 835,794.06 | 62% | 696,525.27 | 139,268.79 | 10% | 45% |
| 10220 - NETCENTS II | Aug 1, 2012 | Dec 31, 2021 | 40,501,630.00 | 39,501,410.00 | 35,095,378.73 | 0.00 | 9,322,179.40 | 13,035,095.37 | 12,738,103.96 | 36% | 11,071,996.79 | 1,666,107.17 | 5% | 87% |
| 10225 - DOT DO WJHTC | Dec 1, 2017 | Dec 31, 2018 | 2,006,000.00 | 756,000.00 | 714,277.40 | 0.00 | 320,538.52 | 0.00 | 393,738.88 | 55% | 316,181.14 | 77,557.74 | 11% | 36% |
| 10250 - USAID Program Management | Aug 1, 2012 | Sep 30, 2021 | 5,650,000.00 | 4,400,000.00 | 3,313,627.29 | 0.00 | 1,262,068.22 | 647,641.16 | 1,403,917.91 | 42% | 1,303,111.28 | 100,806.63 | 3% | 59% |
| Total | | | 348,184,214.01 | 287,244,410.00 | 243,201,729.34 | 110,000.00 | 108,628,361.85 | 81,132,557.71 | 53,550,809.78 | 22% | 95,212,147.42 | (41,661,337.64) | (17%) | 70% |

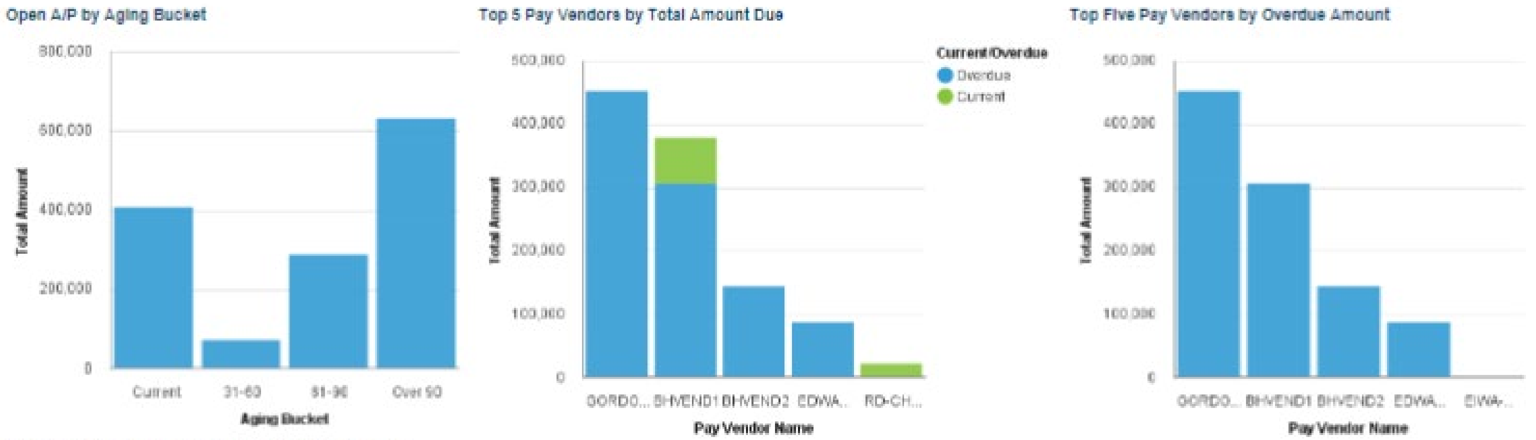
# Coming Soon

Available with v8.2.12

## Accounts Payable Aging

System: admin

Company 1 for the Period Ending 12/31/2025




Visualization rendering is not supported for this output type.

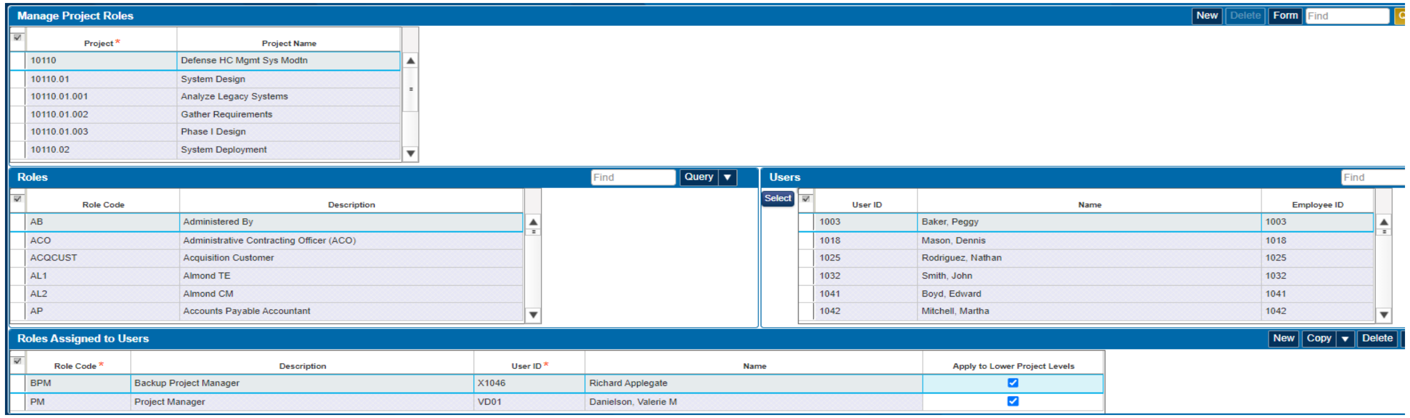
| Voucher | Account ID Name | Org ID Name | Current Status | Invoice | Invoice Date | Due Date | Current | 31 to 60 | 61 to 90 | Over 90 | Total Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Pay Vendor ID: 41 Customer** | | | | | | | | | | | |
| 970003298 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | | 04/30/2015 | 05/30/2015 | 0.00 | 0.00 | 0.00 | 500.00 | 500.00 |
| 970003299 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | | 04/30/2015 | 05/30/2015 | 0.00 | 0.00 | 0.00 | -500.00 | (500.00) |
| **Subtotal for Pay Vendor ID: 41 Customer** | | | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Pay Vendor ID: BHVEND1** | | | | | | | | | | | |
| 970135180 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | | 01/01/2024 | 01/01/2024 | 0.00 | 0.00 | 72,000.00 | 0.00 | 72,000.00 |
| 970135181 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | | 01/01/2024 | 01/01/2024 | 0.00 | 0.00 | 72,000.00 | 0.00 | 72,000.00 |
| 970135182 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | | 02/01/2024 | 02/01/2024 | 0.00 | 72,000.00 | 0.00 | 0.00 | 72,000.00 |
| 970135186 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | | 03/01/2024 | 03/01/2024 | 72,000.00 | 0.00 | 0.00 | 0.00 | 72,000.00 |
| 970135274 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | | 01/01/2024 | 07/01/2023 | 0.00 | 0.00 | 0.00 | 90,000.00 | 90,000.00 |
| **Subtotal for Pay Vendor ID: BHVEND1** | | | | | | | 72,000.00 | 72,000.00 | 144,000.00 | 90,000.00 | 378,000.00 |
| **Pay Vendor ID: BHVEND2** | | | | | | | | | | | |
| 970134017 | 02000 - Accounts Payable | 1 - ==SuperTech, Inc.\|711dm16 | HOLD | BLPRBIL 2024 | 01/01/2024 | 01/01/2024 | 0.00 | 0.00 | 144,000.00 | 0.00 | 144,000.00 |
| **Subtotal for Pay Vendor ID: BHVEND2** | | | | | | | 0.00 | 0.00 | 144,000.00 | 0.00 | 144,000.00 |
| **Pay Vendor ID: EDWARD BEEMER** | | | | | | | | | | | |

NOTE

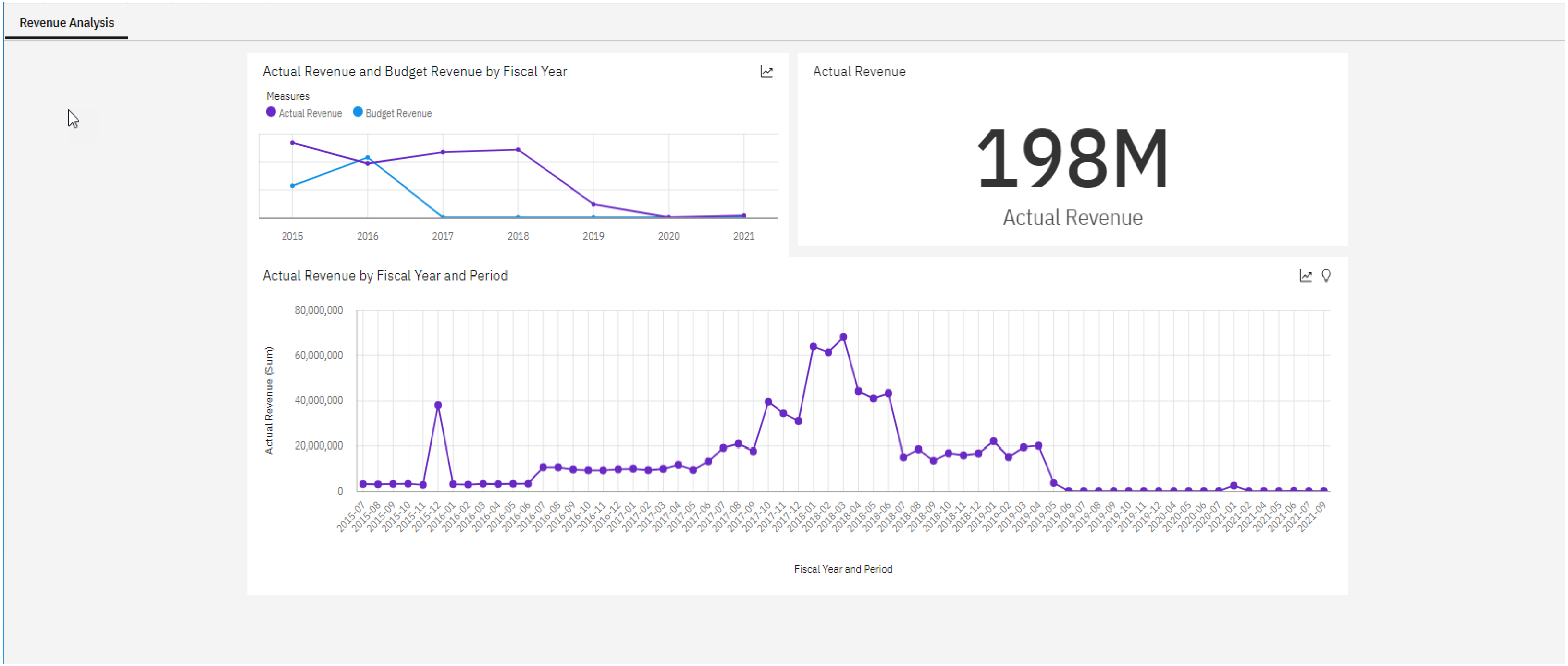
Please see our Release Notes for full listing of new features. This upgrade is full of enhancements.

# Top New Features of v8.2

- Project Role Security
- Org Secured Contracts & Opportunities packages and reports.
- Finalized transition of unsecured legacy content to new secured models.
- Expanded library of reports. Added ~18 new objects.



# Dashboard Demo



NOTE To register for upcoming Coffee Breaks or watch past Coffee Breaks click here.

# BI Coffee Break Series

- 30-minute webinars with live Q&A.
- Upcoming Topics:


Deltek

# ProjectCon 2024

SAVE THE DATE:

**November 12-14**
Gaylord National
Washington, DC Area

## *Mark Your Calendar*

Our annual customer conference, Deltek ProjectCon 2024, is happening November 12-14 at the Gaylord National, located just outside of Washington, DC! Connect with our community of passionate project enthusiasts over three incredible days of learning, networking and fun.

Sign up to be notified when registration opens.

Notify Me >>

# Costpoint BI Implementation and Best Practices

# Report / Dashboard Development Process Overview

Report Requirements

Evaluate Requirements

Decide on best BI solution

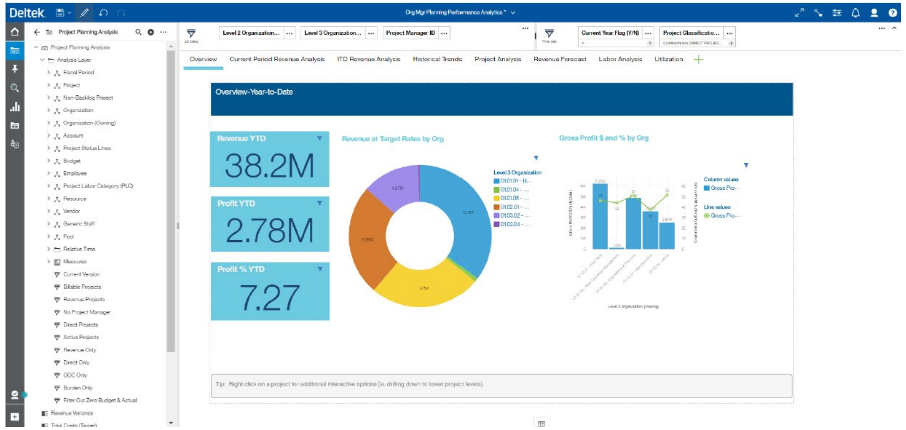
Design BI solution

Report/Dashboard Development

Testing & Validation

End User Deployment

Report Maintenance




**BI Solution Options:**

- Existing canned report/dashboard
- Custom dashboard
- Custom report
- Schedule & burst reports

# Leverage Costpoint BI Burst & Schedule functionality

- Leverage burst & schedule functionality to receive information directly via email.  Some examples are:

  - Signed timesheet other than employee sent directly to employees & supervisors to notify both that timesheet needs to signed
  - Project management packet of reports emailed directly to PM assigned to project
  - Subcontractors awaiting approval
  - Notify when critical inventory falls below minimum balance

# Security Options in Costpoint BI

- Costpoint Authentication Protocol (CAP)
  - Utilizing Standard & Custom Costpoint Groups
  - Create streamline access for ease of maintenance
  - Ease of user rights visibility
  - NEW – Standard Company Content Folders
- Org Security
  - Limiting data using the same logic used in Costpoint
  - Limiting access to PII information without creating multiple reports
  - Reducing the overall number of reports

# Security Options in Costpoint BI (cont)

- Role Security
  - NEW - Limiting Data based on a Project Administrator, Project Manager
  - Cascading Down data limits
  - Robust reporting capabilities
- Folder Security
  - Source Location for Reports
  - Single Report with multiple View Locations
  - Govern Access using Standard or Custom CAP groups
  - NEW – Single View of all accessible reports using standard Company Content Folders

# Q & A

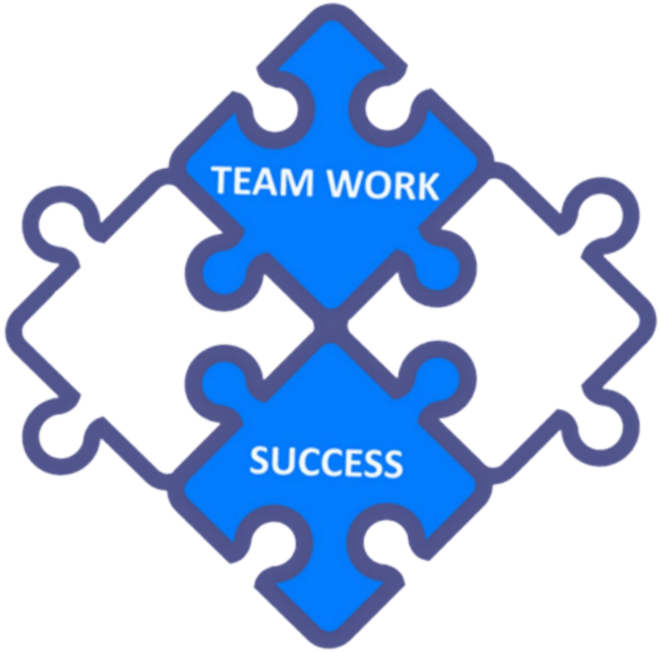
Enter questions in the Webex Chat

# Contact Us

(703) 902-0030

www.LexellBlue.com

info@LexellBlue.com



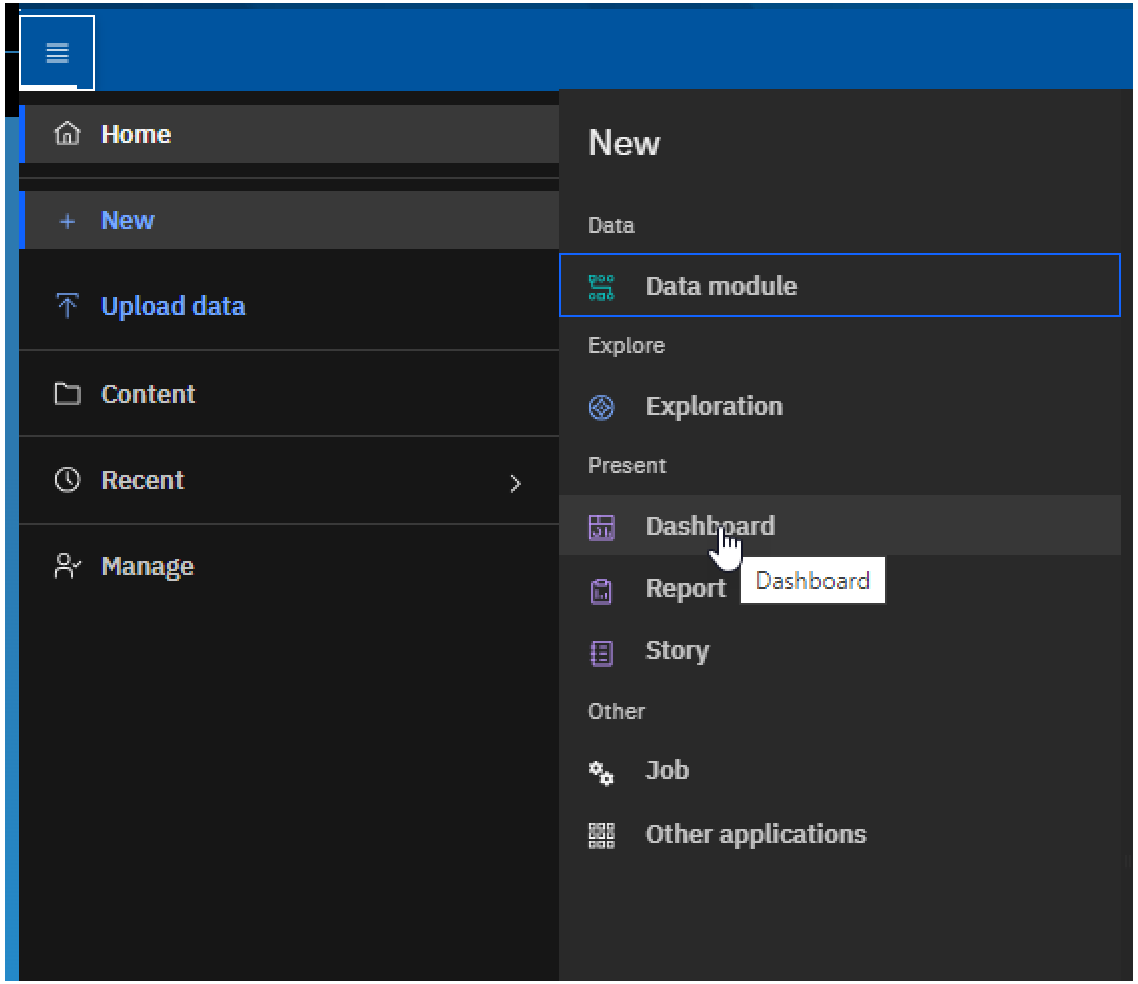

**Experience.**
**Quality. Solutions.**

# Appendix

## Dashboard demo step by step

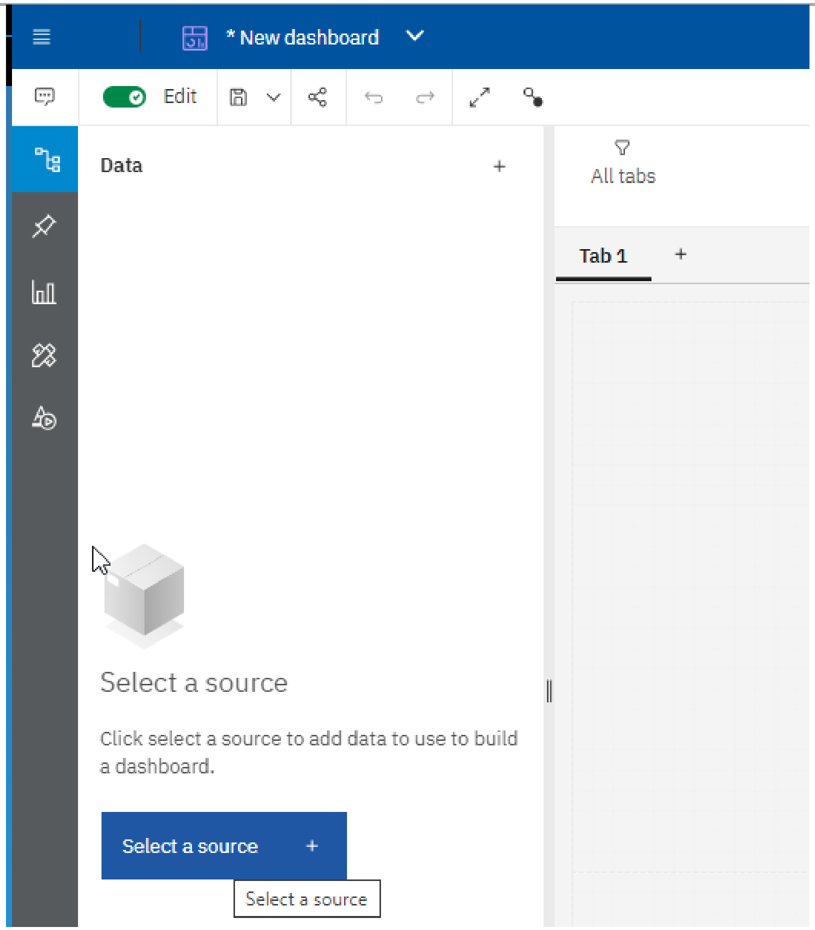
# Dashboard Demo Step by Step

- Create a new dashboard by navigating to the hamburger menu.
- Select **New.**
- Select **Dashboard.**
- Select the Template with 4 boxes.
- Click **Create**.



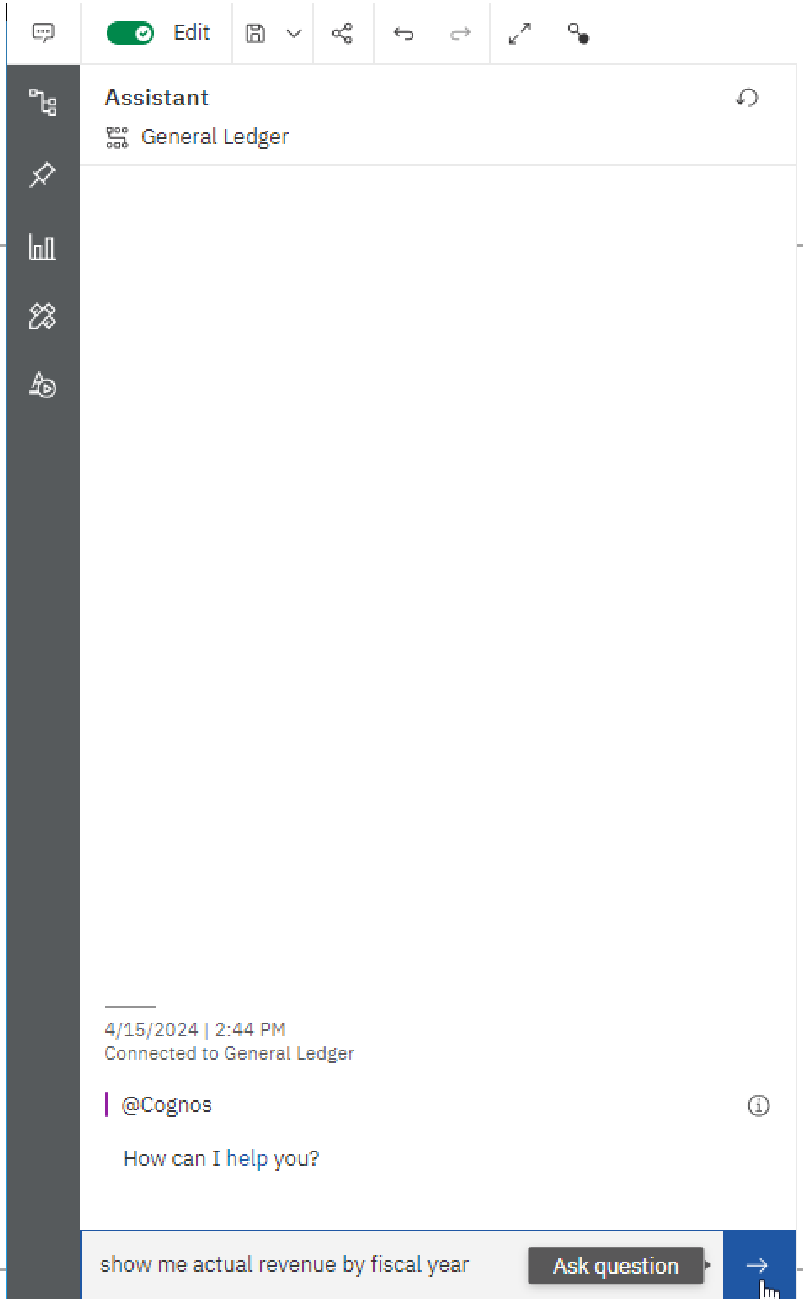
# Dashboard Demo Step by Step

- Next click on **Select  a Source.**
- Navigate to Team Content>Company Content>Your tenant folder>Smart AI>Data Modules>General Ledger.
- Click **Add**.



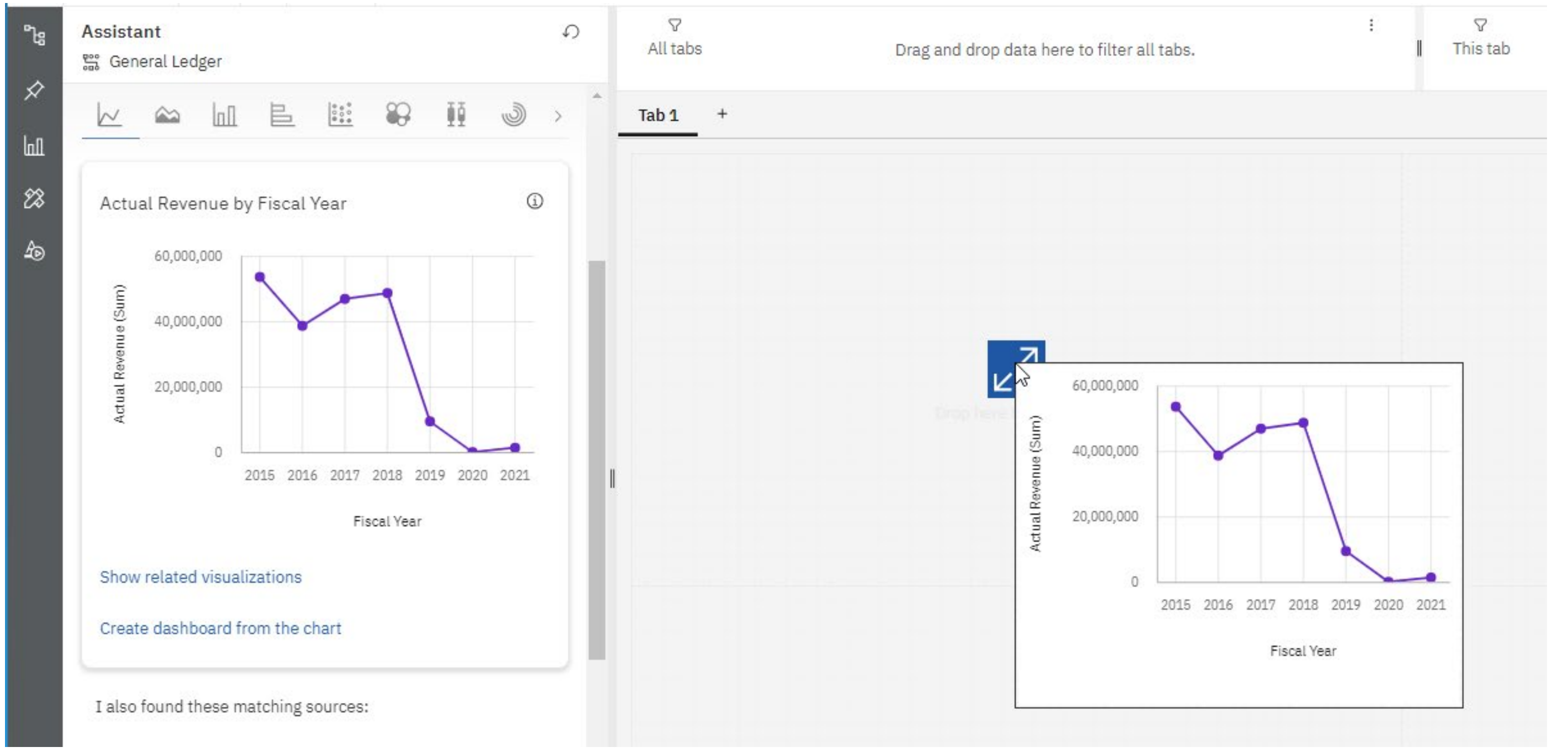
# Dashboard Demo Step by Step

- Click the **AI assistant** icon in the upper left (to the left of the Edit icon).
- In the 'Ask a question box' type 'show me actual revenue by fiscal year'
- Submit your question by clicking the blue arrow.



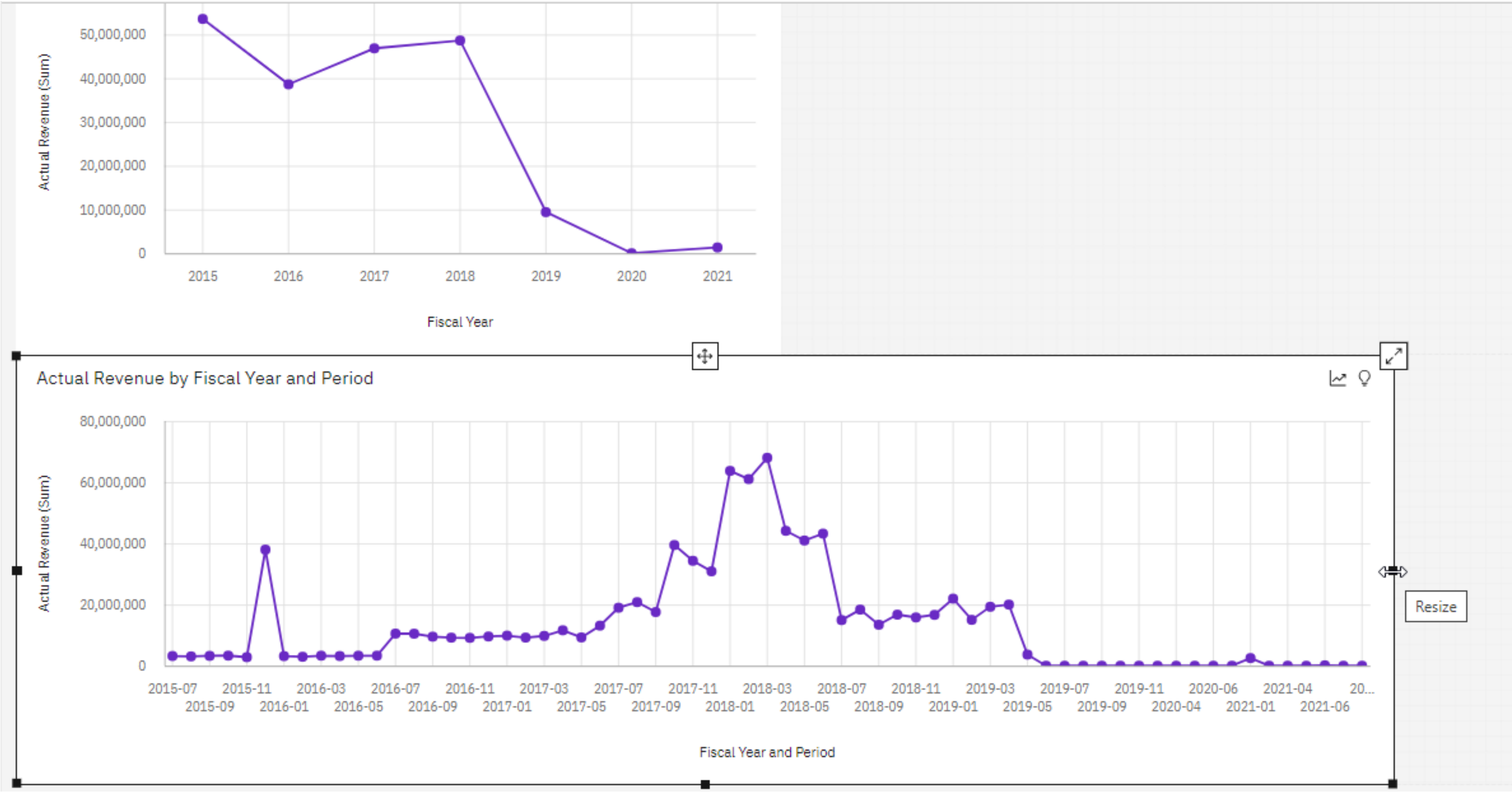
# Dashboard Demo Step by Step

- The AI assistant will present a visualization based on your question.
- Drag this to the canvas and place on the blue square that appears when you hover over the first box of the template.



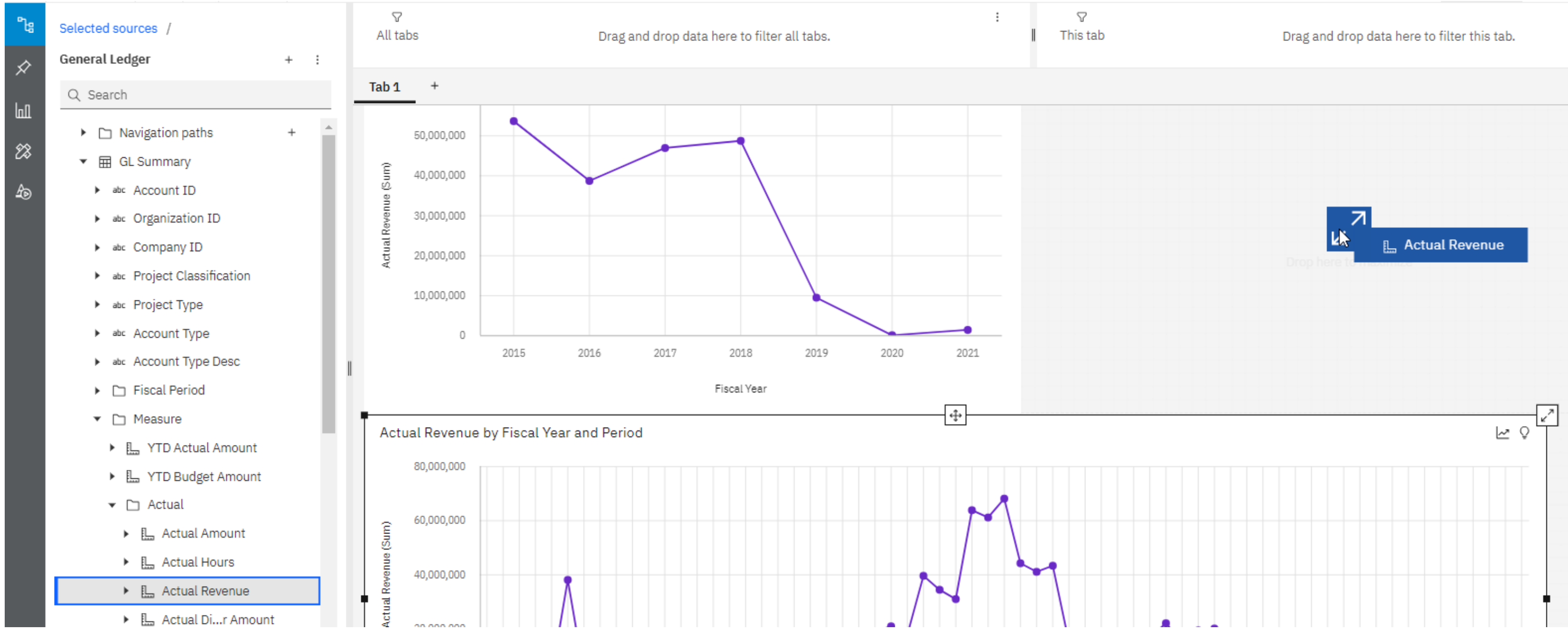
# Dashboard Demo Step by Step

- Type a new question…
- ‘Show me Actual Revenue by Fiscal Year and Period’.
- Drag this visualization to the bottom left corner of the template and drop when the blue box appears.
- Resize my dragging the handles on the right of the chart so the object spans the width of template.



# Dashboard Demo Step by Step

- Next, manually create a visualization by clicking on the **Sources** icon under the AI assistant…
- Navigate to GL Summary>Measures>Actual>Actual Amount and drag and drop this column into the upper left portion of the template.



# Dashboard Demo Step by Step

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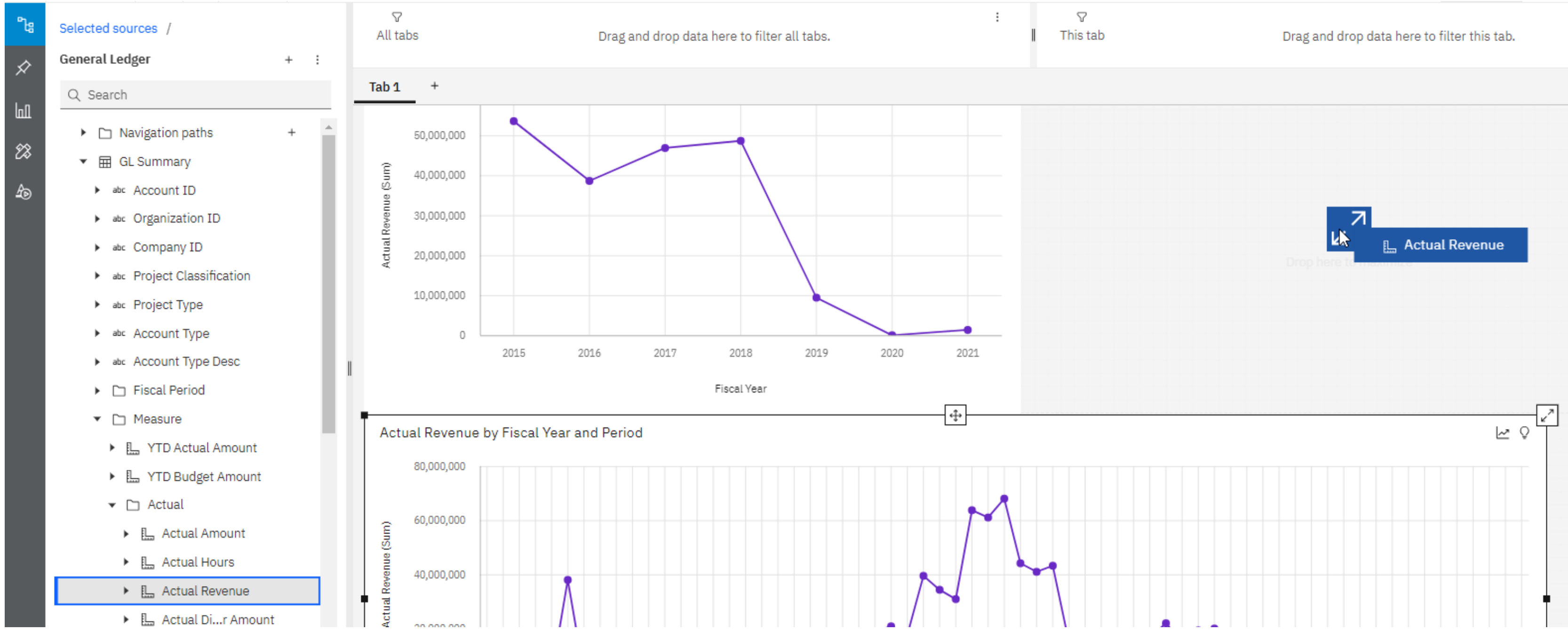

# Dashboard Demo Step by Step

- Click on the tab and name the tab ‘Revenue Analysis’.
- Save the dashboard to ‘My Content’.
- Experiment by clicking on different data points to see how the visualizations interact.
- Open the Fields panel. Can you add Budget Revenue?
- Explore Properties panel. Can you change color palette? Trying experimenting with other formatting options and remember to save your changes.