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Deltek Costpoint® Enterprise Cloud Costpoint

Cumulative Update Release Notes - September 2017 (with ESS)

October 10, 2017

Contents

Overview

This document is a compilation of the release notes distributed for the enhancements that are part of system jar 033. This document also includes release notes for enhancements made in relation with application jars, libraries, and regulatory updates since the last system jar release.In addition an October ESS update is included.

Extend Purchase Order (PO) Release Number

The validation logic of several Costpoint applications has been modified to allow use of up to five (5) digits of purchase order (PO) release number. This change now enables Costpoint to display up to five (5) digits of the PO release number on a number of screens as well as allow you to use and save a record with the same number of digits.

In addition, this feature allows you to import PO and PO voucher with PO release number of up to five (5) digits for delimited files.

Standard Costing

Changes were made to these applications in preparation for the future implementation of a new feature.

> These enhancements have no impact on current functionality.
>
> The functionalities of these updates/enhancements are not available until the full feature is released.

This feature enables you to provide users the ability to use standard costing methods for inventory valuation. Prior to this feature, only average costing method is available in Costpoint.

Standard costing enhancement features the following:

- New secure standard costing tables for item standard cost and project item standard cost
- New application to calculate future standard costs
- New application for purchase price variance (PPV)
- Ability to calculate and post variances for PPV and manufacturing costs (materials, labor, misc 1, misc 2, subcontractor) and corresponding overheads.
- Ability to update item preprocessor for new cost tables
- Modified WIP variance process to include breakdowns for average actual and standard costing

Enhancements to Training Codes - Detail Job Title Links and Reorganization of Education, Skills, and Training Screens

This Costpoint release contains the following enhancements:

- Linking a Detail Job Title to a Training Code is no longer required. As a result, you do not have to set up multiple training codes for a training that relates to more than one detail job title.

- You no longer need to assign detail job titles to training codes.

- You will now be able to link multiple training codes to a single detail job title.

- When assigning training codes to employees, you will not receive an error message if the employee's detail job title is not linked to the training code.

- Existing Licenses, Skills, Training, and Security applications are now available to Costpoint users with a core license. Previously, only users with an Costpoint Human Resources (HR) license have access to these applications

- You can now assign certifications to employees.

> These enhancements are required for the upcoming release of the Costpoint Contract Management feature.

Education, Skills, and Training Applications

In order to make the Education, Skills, and Training applications available to Costpoint Core license users, the applications under the Costpoint Personnel module have been transferred to the Employee Controls menu in the Costpoint Employee module (**People » Employee » Employee Controls**). This includes the following screens:

- **Manage Areas of Education (HPMSTUDY)**
  - This screen was previously named as "Manage Areas of Study Codes.

- **Manage Courses (HPMCRSE)**
  - This screen was previously named as "Manage Course Codes."

- **Manage Degrees (HPMDEGRE)**
  - This screen was previously named as "Manage Degree Codes."

- **Manage Professional Organizations (HPMPROF)**
  - This screen was previously named as "Manage Professional Organization Codes."

- **Manage Skill Codes (HPMSKILL)**
  - No other changes were applied to this screen.

- **Manage Skill Levels (HPMSLVL)**
  - This screen was previously named as "Manage Skill Level Codes."

- **Manage Training Codes (HPMTRAIN)**
  - The screen longer requires a detail job title when creating a training code.

- The **Detail Job Title** and **Functional Job Title** fields were removed.

- A **Detail Job Title Validation Method** field allows you to select the type of validation to be performed when assigning a training code to an employee. Valid options are No **Validation**, **Warning** and **Error**. This is available only to Costpoint HR license users.

- An Eligible Detail Job Titles subtask allows you to link detail job titles to a training if the **Detail Job Title Validation Method** is **Error** or **Warning**. This is available only to Costpoint HR license users.

  - **Manage Training Locations (HPMTRNL)**

    - This screen was previously named as "Manage Training Location Codes."

  - **Manage Training Sources (HPMTRNS)**

    - This screen was previously named as "Manage Training Source Codes."

  - **Manage Training Program Schedules (HPMTRNPS)**

    - The **Detail Job Title** and **Functional Job Title** fields were removed.

    - The Certificate to Receiver field is now labeled **Certificate**.

  - **Print Training Program Schedules (HPRPROG)**

    - This screen was previously named as "Print Training Program Schedule."

    - The report no longer displays the **Functional Job Code** and **Detail Job Code** fields.

Manage Education, Skills & Training Data (HPMEDS)

- The screen is now available to Costpoint Core license users. This screen was previously available to only to Costpoint HR-Personnel license users.

- The **Detail Job Title** field and the Career Plans subtask are available only for Costpoint HR license users.

- The Trainings subtask is now labeled as "Training."

- A Certification Details subtask allows you to track certifications attained by employees.

- The application was transferred from Employee HR Information menu to the Basic Employee Information menu (**People » Employee » Basic Employee Information**).

Update Employee Training (HPPTRNE)

- The application was transferred from Employee HR Information menu to the Basic Employee Information menu (**People » Employee » Basic Employee Information**).

- The screen is now available to Costpoint Core license users. This screen was previously available to only to Costpoint HR license users.

Employee Self Service (ESS) Benefits Enrollment Enhancements

Costpoint Employee Self Service now provides user experience improvements for benefits enrollment through life events or open enrollment. With this release, the Benefits Enrollment screen and Life Events/New Hires screen will use a layout that is similar to ESS in Deltek Time and Expense. Existing tabs are now arranged vertically on the left side of the screen to allow you to quickly view corresponding benefit data. You can now use **Continue** and **Back** buttons for navigating through each tab until you complete the entire benefit enrollment process.

> For more details, please refer to the *Costpoint 7.1.1 Employee Self Service Benefits Enrollment* video demonstration which you can view at: https://help.deltek.com/Product/Costpoint/USS/ People/BenefitsEnrollment.

In addition to these enhancements, the release also includes the following changes to the tabs on the Benefits Enrollment and Life Events/New Hires screens:

Current Elections (Benefits Enrollment Screen Only)

- The label changed from "New Plan Year" to "New <Pay Period Frequency> Premium" (for example, New Monthly Premium). This column now displays a subtotal amount. The label changed from "Current Plan Year" to "Current <Pay Period Frequency> Premium" (for example, Current Monthly Premium).
- The Query button is no longer available.

Dependents and Beneficiaries

- Remove the links to the Beneficiary subtasks
- The Current Benefits subtask includes the following changes:
- The subtask name changed from "Current Benefit Coverage" to "Current Benefits."
- The column name changed from "Module" to "Benefit Type."
- In the Benefit Enrollment Elections/Life Event Elections subtask, the column name changed from "Module" to "Benefit Type."

Dental Insurance, Dependent Life, Medical Insurance, Spouse AD&D, Spouse Life Insurance, and Vision Insurance

- These tabs now have the same functionality and layout.
- A group box displays the current benefits at the top of the screen. This is labeled as: "*(Type of Insurance)* - Current Coverage Level". For example, Vision Insurance - Current Coverage Level.
- A Select New Coverage Level subtask displays all the options for the benefit for the new plan year in a table. You can select only one option from table.
- In applicable tabs, the subtask name changed from "Dependent Information" to "Select Dependents for Coverage." The **Covered** column in this subtask is now labeled "Select."

- In applicable tabs, the subtask name changed from "Spouse Insurance" to "Select Spouse for Coverage." The **Covered** column in this subtask is now labeled "Select."

Employee Life Insurance, Supplemental Life, Long Term Disability, Short Term Disability, AD&D, and Supplemental AD&D

- These tabs now have the same functionality and layout.

- A group box displays the current benefits at the top of the screen. This is labeled as: "*(Type of Insurance)* - Current Coverage Level". For example, Employee Life Insurance - Current Coverage Level.

- A Select New Coverage Level subtask displays a table of all the benefit options for the new plan year. You can select only one option from table.

Medical FSA, Dependent FSA, and Medical HSA

- The column name changed from "Current" to "Current Contribution."

- The column name changed from "New" to 'New Contribution." **Beneficiaries**

- The tab name changed from "Designate Beneficiaries" to "Beneficiaries."

Other Benefits

The Current Coverage Level and New Coverage Level are now displayed subtasks instead of as tabs. You will still use Lookup function to select new coverage options on this tab.

Summary (Benefits Enrollment Screen Only)

- A new button, **Confirm**, allows you to authorize your benefit selections. This button performs the same action as clicking the **Default Action** (gears) icon on the global toolbar.

- Elections that you did not select will have a blank **Plan** column and a **Status** column value of **Election Skipped**.

Known Issues

This section includes summaries of the issues that exist in Deltek Costpoint and will be resolved in the future. You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. The additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

> This section does not contain a complete list of outstanding issues. Deltek only includes the high priority issue in Deltek Costpoint for this release. Please contact Deltek Customer Care if these known issues present a significant impact on your business.

Benefits Enrollment (ESMBENENROLL)

- **Deltek Defect Tracking Number: 848225**

Description: The following unexpected error displays if the user attempts to roll over their current

Medical HSA election to the new plan year, and they also opt to roll over their Medical FSA: "An HSA may be elected with an FSA only if the FSA is designated as a Limited Purpose FSA." **Customers Impacted:** This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

- **Deltek Defect Tracking Number: 852012**

Description: Error messages will continue to display even after the issue is rectified. These old errors will not prevent you from saving or continuing the process, but these errors also should not display after you fix the issue.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

- **Deltek Defect Tracking Number: 852715**

Description: On the Dependent Life Insurance tab, if the employee has existing Dependent Life coverage and has not selected new Dependent Life coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Dependent Life Coverage.

- **Deltek Defect Tracking Number: 852716**

Description: On the Spouse Life Insurance tab, if the employee has existing Spouse Life coverage and has not selected new Spouse Life coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Spouse Life Coverage.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

- **Deltek Defect Tracking Number: 852717**

Description: On Spouse AD&D Insurance tab, if the employee has existing Spouse AD&D coverage and has not selected new Spouse AD&D coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Spouse AD&D Coverage.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

Direct Deposit (ESMDIRDEP)

- **Deltek Defect Tracking Number: 852070**

Description: If your screen resolution is low when you open the Direct Deposit tab on the Life Events/New Hires screen, the Current Accounts table may be minimized. You will need to click on the **Restore** button to expand the Current Accounts table.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

Life Events/New Hires (ESMLIFEEVENT)

- **Deltek Defect Tracking Number: 742724**

  Description: When the user is categorized as a Full-Time Equivalent Employee in the Manage

  Full-Time Equivalent Eligibility screen and a new Life Event record is generated from the ESS Life Events/New Hires screen, the **Full Time Equivalent Employee** check box for the generated record is not selected.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 788990**

  Description: The default Benefit Package is not based on an Employee Type of **Regular**, when a life event is saved for a Part-Time or Temporary employee that:

  - Has a Manage Full-Time Equivalent Eligibility record where **Full-Time Equivalent** value is **Y** and the **Coverage Offer Status** is **Approved**; and

  - Is not linked to a Benefit Package in Manage Employee Benefit Elections.

    Currently, the benefit package is defaulting based on the employee's **Employee Type** from the Manage Employee Salary Information screen.

- **Deltek Defect Tracking Number: 818244**

  Description: The application allows you to select a child for coverage, even though the child's age is greater than the Benefit Plan's Dependent Maximum Age.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 851477**

  Description: The Medical HSA Plan is not displayed in the Summary tab even when the user enters a New Contribution in the Medical HSA tab. The value is being saved, but just not displayed in the Summary tab.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

Self Service Configuration (ESMESS)

- **Deltek Defect Tracking Number: 844957**

  Description: The application stops responding if you attempt to open the Life Events subtask link and an existing workflow model has been set up for the application.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

Self Service Status (ESRSELFSERVSTAT)

- **Deltek Defect Tracking Number: 787914**

  Description: The Self Service Status application sends a notification e-mail to an employee regarding Benefits Open Enrollment even if the **Notify Employee** option is set to **None** in the Workflow Options tab of the Configure Self Service Settings screen.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

State Withholding (ESMSTATEWH)

- **Deltek Defect Tracking Number: 850886**

  Description: If the employee does not have a Federal Filing Status or does not have an Employee Tax record in Costpoint, the following error is displays: "You are currently exempt from federal taxes. In order to change your status, please see your Payroll Administrator."

  This message should be an informational message, not an error message. Please note that you will be able to proceed with the life event process even if this error message displays.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

Time & Expense

Updates to Manage/Approve Timesheets

The following enhancements were added:

- The Missing Timesheets subtask link now only displays if the subtask contains missing timesheet records.

- A new **ID** field, where you can enter the Employee ID, has been added in the Criteria section of the screen. Additionally, it also displays under Search Criteria in the Query dialog box.

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