Deltek

Deltek Costpoint® 7.1.1

Cumulative Release Notes for September 2019

September 27, 2019

This edition published September 2019.

Contents

Overview

This document is a compilation of the release notes distributed for the enhancements made in Costpoint, Costpoint Planning, and Time & Expense in September 2019. This document includes descriptions of the enhancements in relation with system jars, application jars, libraries, and regulatory updates since the last system jar release.

> **Note:** Release notes contain summaries of the enhancements made. Refer to the online help for additional details.
>
> Costpoint 7.1.1 Online Help

Platform Changes

There are no changes in the platform for this release.

Installation Instructions

Custom Programs Affected

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Support Center at https://deltek.custhelp.com before you install the update.

To Download the HotFix/Feature Update:

1. From Internet Explorer, go to https://dsm.deltek.com.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Support Center credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

To Install the HotFix/Feature Update:

Refer to the installation instructions posted on Deltek's Support Center site, https://deltek.custhelp.com.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.
- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.
- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

To Check to See if the HotFix is Installed:

1. Open the application that was updated.
2. Click **Help** > **About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

To Check to See if the Feature is Installed:

1. Click **Help** > **About Costpoint** from the Costpoint toolbar.
2. Open the Features subtask and click the Feature that was just installed.
3. Open the Applications subtask. Check the list of applications and their corresponding application jars and see if they are correct and have been successfully deployed (highlighted in green).
4. Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

Note: Most of the features installed have their corresponding patches, but not all.

More Information:

If you have any questions, please contact Deltek Support Center at https://deltek.custhelp.com.

Online Help Improvements

These help improvements apply to help topics for screens in the following areas:

- Accounting
- Contracts
- Projects
- Admin
- Reports & Analytics
- Time & Expense

Web Browser

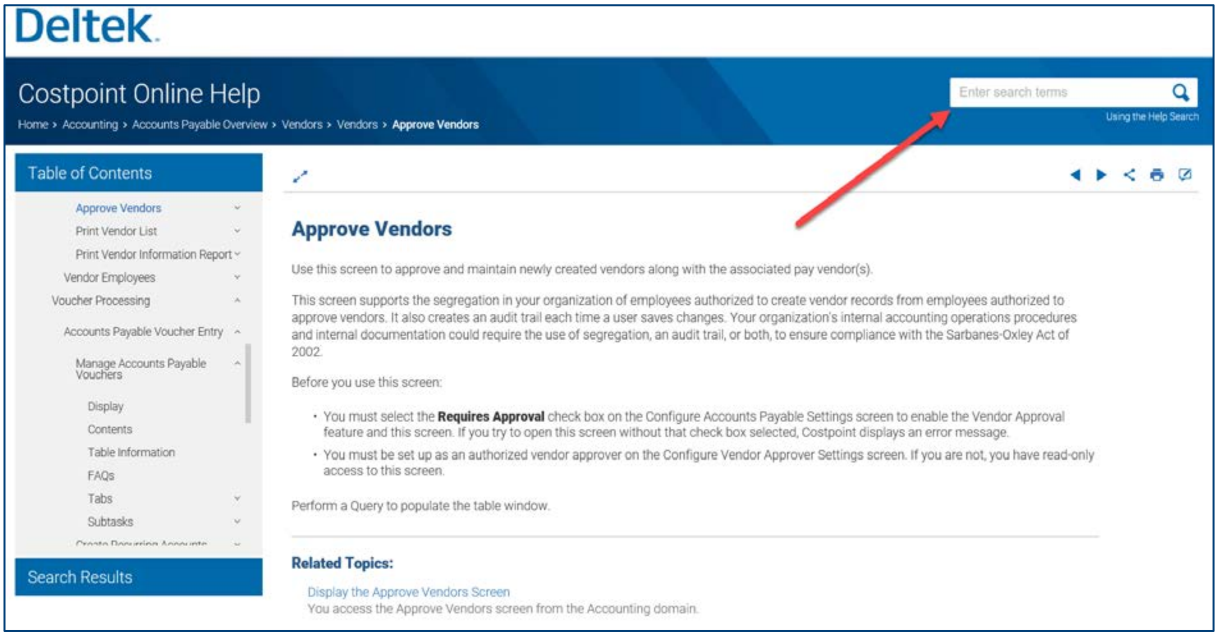
The online help now works with Microsoft Internet Explorer 11.

Online Help Search

The search functionality in the online help has been improved. You can now search for complete phrases in topics and use an AND word search.

To access the search field in help: On any Costpoint screen within the areas mentioned above, select **Help** from the Help menu or press **SHIFT + F1**.

The search field is in the upper right corner of the help screen.



You can also click the word **Deltek** in the upper left corner of the help screen to open the help home page, which also has a search field.

Searching for Phrases in Topics

Enter phrases in quotation marks in the help search field to return a list of only the topics that contain the complete phrase.

Example:

What you want to search for	Entry in the help search field
All topics that mention the Vendor Information report	“vendor information report”

Searching for Multiple Words in Topics (AND Search)

To search for topics that include all the words that you enter in the search field, enter a plus sign (+) between each word. Each topic returned includes all the words that you entered in the search field, regardless of the order of the words or whether the words are adjacent to each other in each topic.

Example:

What you want to search for	Entry in the help search field
All topics that contain both the words “approve” and “invoice”	approve + invoice

Searching for Multiple Words in Topics (OR Search)

When you enter words in the help search field without quotes or plus signs, the search assumes an OR between each word. All the topics that have any or all of the words are returned in the search.

An OR search is helpful when you are looking for something, but you are not sure of the name or term used in the help.

Example:

What you want to search for	Entry in the help search field
All the topics that contain the word “check” or “payment” or both	check payment

Scope of the Help Search

The search field in online help searches only the help topics. It does not search for content from the Deltek Learning Zone or the Deltek Support Center website.

Other Online Help Improvements

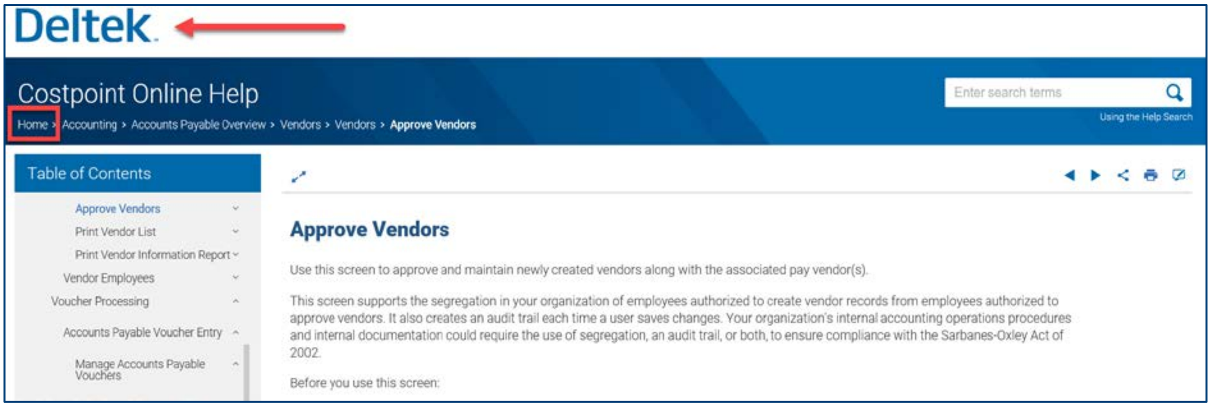
A New Home Page

The home page now has links to the Deltek Learning Zone and the Deltek Support Center website.

To access the home page:

1. On any Costpoint screen within the areas mentioned above, select **Help** from the Help menu or press **SHIFT + F1** to open the help.
2. On the help screen, do either of the following:

- Click the word **Deltek** in the upper left corner of the screen.
- Click **Home** in the help navigation breadcrumb path above the Table of Contents.



An Easy Way to Send Feedback to Deltek About Any Help Topic

On any help topic, click the new **Send Feedback** icon in the toolbar above the topic.

In the email that opens automatically, enter comments and suggestions for the specific topic and click **Send**. The **To** and **Subject** fields in the email are prefilled automatically. The body of the email prefills with the help topic name. We appreciate your constructive feedback to help us continuously improve the online help.

> **Note:** The first time you click , you must select your email application in the How Do You Want to Open This dialog box. Also, select the **Always use this app** check box so that this dialog box does not display each time you click .

Costpoint

Accounting

There are no changes to the Accounting domain for this release.

Contracts

There are no changes to the Contracts domain for this release.

Projects

There are no changes to the Projects domain for this release.

People

There are no changes to the People domain for this release.

Regulatory and Compliance

Minnesota Tax Withholding

Minnesota's withholding tax tables for 2019 have been updated for the second time due to the Minnesota tax law that was enacted on May 30, 2019. In relation to this change, Costpoint will use the new tax tables in payroll. This release updates the records effective January 1, 2019 for Minnesota on the Manage State Tax Tables screen.

> **Attention:** For more information, refer to the *2019 Minnesota Withholding Tax Tables*: https://www.revenue.state.mn.us/sites/default/files/2019-09/wh_tables_19_0.pdf.

System Requirements

This enhancement requires the Costpoint 7.1.1 PATCH3704.

IMPORTANT NOTES

Versions 7.0.1 and 7.1.1

You must have the following System JARs loaded before loading this tax table update:

- Costpoint 7.0.1: System JAR 054 (released June 2018)
- Costpoint 7.1.1: System JAR 028 (released April 2017)

Notes:

- **System JAR 028 for Costpoint 7.1.1** introduced programming changes to limit the need for regulatory changes to be released via System JAR. The coding changes allowed us to disassociate payroll computation coding changes from future 7.1.1 System JAR releases. So, after System JAR 028, changes to Costpoint version 7.1.1's Compute Payroll application will not require deployment via System JAR as they did in the past. This not only allows us to deploy Costpoint 7.1.1 regulatory updates and fixes more quickly, but it has also helped us keep the System JAR requirements for Calendar Year End releases as minimal as possible.
- **System JAR 054 for Costpoint 7.0.1** introduced an update to the Colorado state tax withholding tables. In response to the federal tax code overhaul (Pub. L. 115-97), the Colorado Department of Revenue announced an update to their Allowance table on April 2, 2018 (effective April 1, 2018). This required an update to Costpoint Compute Payroll, which can only be released through a System JAR in Costpoint version 7.0.1.
- **System JAR 049 for Costpoint 7.0.1 and System JAR 028 for Costpoint 7.1.1** introduced a much needed change to the State Filing Statuses in Costpoint. Rather than using filing statuses that only applied to Costpoint (Both, Miscellaneous 1, Miscellaneous 2, etc.) and had to be manually mapped to each state's actual filing statuses, Costpoint 7.0.1 and 7.1.1 have been updated to use each state's actual filing status(es). Though the new filing statuses were introduced in April 2017, Deltek will continue to support tax table updates based on the original state filing statuses through **02/28/2019**. In order to load any tax table updates released by Deltek in March 2019 or later, you must update to the new filing statuses by running the Update State Filing Statuses toolkit in the **People » Payroll » Payroll Utilities** menu. Any tax updates released in March 2019 or later will only support the new state filing statuses that were introduced in System JAR 049 for 7.0.1 and System JAR 028 for 7.1.1 (both released in April 2017).

Warning: In order to update the old state filing statuses to the new state filing statuses, you must run the Update State Filing Statuses utility which you can access by going to **People » Payroll » Payroll Utilities** menu. You must run this utility before you can load any tax table updates released by Deltek starting in March 2019. All tax table updates released by Deltek starting in March 2019 will only provide updates for the new state filing statuses.

Warning: Unless specifically noted in the release notes, this state tax update and any future federal and state tax table changes will require the following:

- System JAR 054 for Costpoint version 7.0.1
- System JAR 028 for Costpoint version 7.1.1

Materials

There are no changes to the Materials domain for this release.

Admin

There are no changes to the Admin domain for this release.

Reports & Analytics

Role-Based Dashboards: Limitation on the Number of Dashparts Displayed

The number of dashparts that display on the Dashboard Reports tab depends on the number of dashparts you have open on the Parameters tab and your screen resolution. For example, if your screen resolution is lower than 1680 pixels, not all eight dashparts opened on the Parameters tab will be displayed on the Reports tab.

As a workaround, you can do any of the following:

- Toggle between the Parameters and Reports tabs to add (open) and remove (close) dashparts that you want to view.
- Drag the dashpart table windows up or down on the Parameters tab to rearrange the dashparts. Costpoint displays the dashparts on the Reports tab in the order that they appear on the Parameters tab, first to last.
- Set your screen resolution to 1920 pixels, which is the recommended resolution to view all dashparts. Note, however, that if your screen does not support 1920 pixels, you will not be able to set that resolution.

Costpoint Integration

There are no changes to Costpoint Integration in this release.

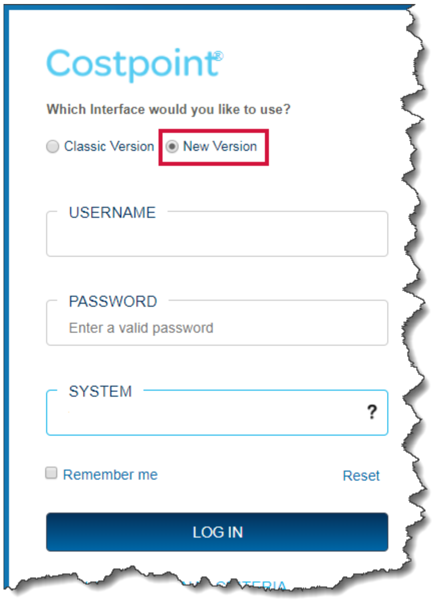
Costpoint Planning

There are no changes to Costpoint Planningn for this release.

Time & Expense: Expense Wizard Release

This document describes changes associated with the release of the new Expense Wizard interface, available in both the Manage Expense Report and Manage Expense Authorization applications.

The Expense Wizard interface is not available from either the Manage/Approve Expense Reports application or the Manage/Approve Expense Authorizations application. It is also only available if you log on to Costpoint using the New Version. It is not available in the Classic Version.



The original format, now referred to as Expert mode, remains the default version, but instructions for switching to Wizard mode, or selecting it as your default mode, are included in the next section.

Additionally, similar instructions are included in a system message that displays automatically open Manage Expense Report or Manage Expense Authorization. The message displays for 30 days, unless otherwise changed by your system administrator.

Instructions for switching to Wizard mode are also provided in a system message that automatically displays when you open Manage Expense Report or Manage Expense Authorization. The message displays for 30 days, unless otherwise changed by your System Administrator.

Attention System Administrators:

The system message that introduces users to the Wizard interface was implemented in the following location: **Admin » System Administration » System Administration Utilities » Administrative Messages.**

The message applies only to the Manage Expense Report and Manage Expense Authorization applications. You can modify or remove the message if desired. You can also change the number of days the message will display by updating the **Active To Date** field.

For more information on other new settings and configuration options, see the “Expense Wizard Administration” section at the end of this guide.

About the Wizard

This section provides an overview of Wizard mode, which is a guided process for entering and submitting expense authorizations and expense reports.

Wizard Mode Versus Expert Mode

Following installation of Expense Wizard, the original expense layout, now referred to as Expert mode, remains the default. Users can instead opt to set the Expense Wizard as the default layout. Thereafter, they can toggle between the two modes from the application menu.

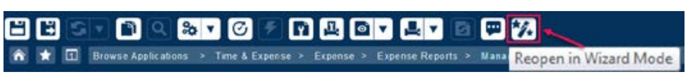
In addition to providing a more guided process, the Wizard differs from Expert mode in the following ways:

- The tabs display as a vertical list, arranged top to bottom by entry order, on the left side of the form, rather than horizontally across the top of the form or as subtask links.

  Although the tabs in the left pane can be used to move between sections of the form, navigation is most easily accomplished by clicking the **Back** and **Continue** action buttons at the bottom right of the Wizard screen.

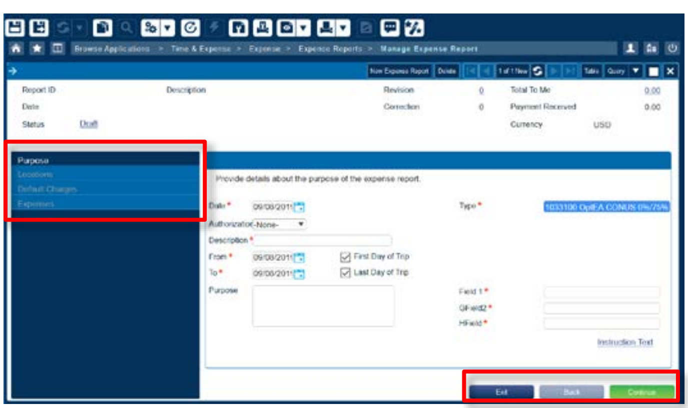
- The Wizard screen that displays for each tab includes a green action button (for example, Continue, Save Report, Submit) that advances you through the process.
- When clicked, action buttons automatically trigger any required validations for the current tab.
- Additional tabs display as they become relevant to the process. For example, when you begin adding expenses, the tabs refresh to reflect all the steps for that process.
- Completed tabs update with a green check mark ().
- Most tabs display text that describes the step, and include an Instruction Text hyperlink that provides directions for completing the step. System Administrators can customized the text.

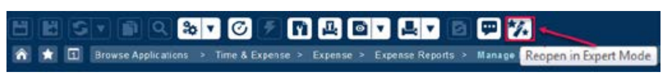
To toggle between Expert and Wizard mode, click the Magic Wand button () on the global toolbar.



If you are in Expert Mode, click the **Magic Wand** button to switch to the Wizard mode.

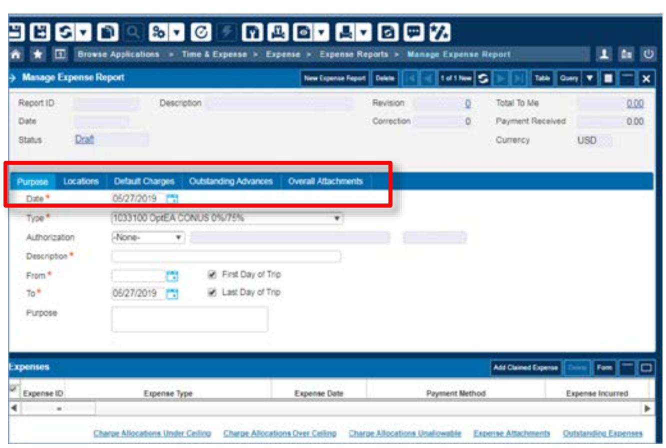
The screen refreshes in Wizard mode





If you are in Wizard mode, click the **Magic Wand** button to switch to the Expert mode.

The screen refreshes in Expert mode:



In Wizard mode, tabs display on the left, and the action buttons used to move between screens display at bottom right. The left navigation pane updates depending on where you are in the process, for example, entering basic information, entering claimed or planned expenses, or submitting the form.

In Expert Mode, the tabs display horizontally, and there are no action buttons to move between sections. Note also that the Purpose tab displays additional subtask links for supporting schedules that do not display in Wizard mode.

Set Expense Wizard as Your Default Layout

If your configuration of Costpoint allows you to save application layout changes in your User Profile, you can set the Wizard mode as your default layout. To set Wizard mode as the default layout:

1. Click **Expense » Expense Reports » Manage Expense Report** to display the Manage Expense Report application.
2. If the Wizard interface is not displayed, click to switch from Expert mode to Wizard mode.
3. Click at top right to open User Preferences.
4. Under Application Preferences, click **Save** in the Application Layout Changes row.

You can also request assistance from your system administrator.

System Administrators: See the “Expense Wizard Administration” section for information on setting this by UI Profile.

Graphical Learning Aid for the Expense Wizard

For a visual overview of the Expense Wizard interface, see the Expense Wizard Click-Thru presentation (*DeltekTimeAndExpense1000ExpenseWizardERClickThru.pdf*).

Expense Wizard Enhancements

This section describes enhancements that apply to Manage Expense Report and Manage Expense Authorization in Wizard mode. Note that some of these enhancements also apply to Expert mode in both applications, as well as to Expert mode in the following applications:

- Manage/Approve Expense Reports
- Manage/Approve Expense Authorizations.

These instances are noted within each enhancement description when applicable.

Note also that some updates described in this section were implemented in response to feedback from participants in the Early Adopter program. These instances are also noted within the descriptions below.

Overall Wizard Updates

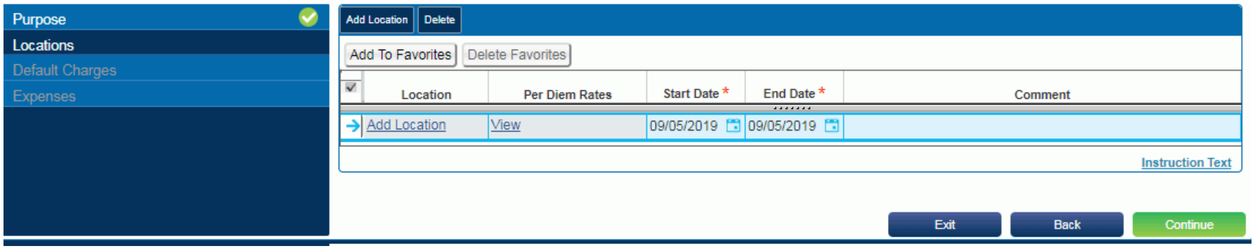
Changes described in this section apply to the Manage Expense Report and Manage Expense Authorization applications.

Purpose Field Modifications

On the Purpose tab in both Wizard and Expert modes, the vertical size of the **Purpose** field was increased to allow at least four lines of text.

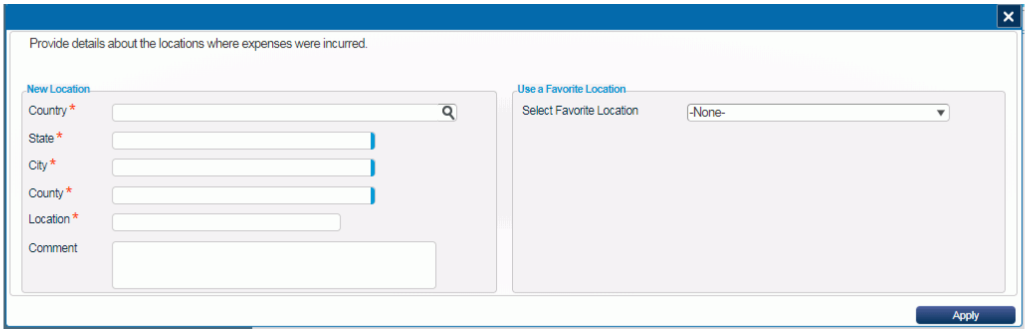
Location Entry Streamlined

Based on Early Adopter feedback, locations display in table format on the Locations tab in both Wizard and Expert modes. To add your first location, click the **Add Location** hyperlink in the first row of the table.

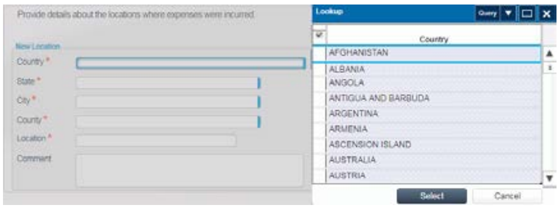


(Note: Use the Add Location button only after the first location has been added.)

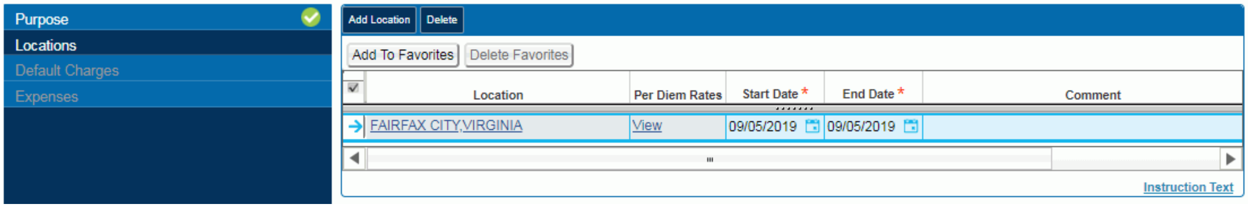
After you click **Add Location**, a pop-up dialog box displays, where you select the location:



From the dialog box, you can use Lookup to choose a regional option or use the **Select Favorite Location** drop-down to choose a previously saved location.



For per diem expense reports that do not include multiple locations, a pre-selected location may display in the table.



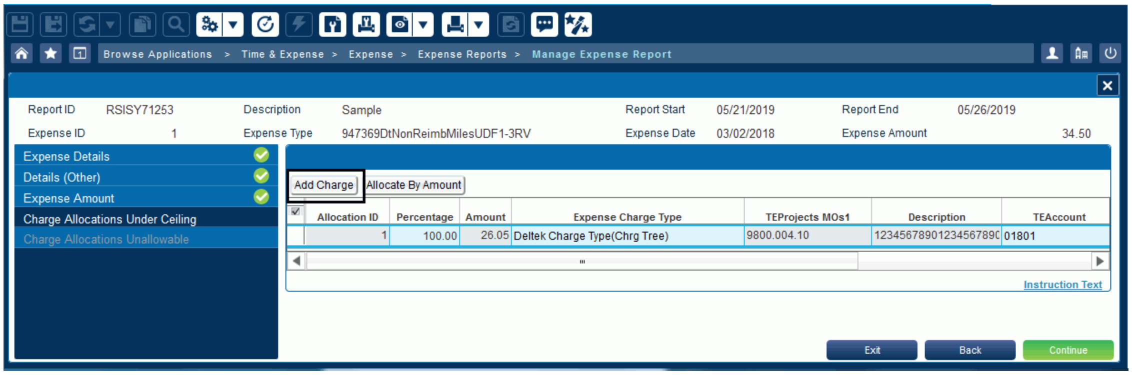
Note also that **Frequent Location** was changed to **Add to Favorites**, similar to existing functionality in Charge Favorites.

This update was also applied to Manage/Approve Expense Reports and Manage/Approve Expense Authorizations.

Add Charge Allocation Made Easier

You now have the ability to add a charge while entering a claimed expense in Manage Expense Report or entering a planned expense in Manage Expense Authorization.

When entering either type of expense, click **Add Charge** on the Charge Allocations Under Ceiling tab. You can select the charge from either the standard Charge Lookup or from Charge Favorites.

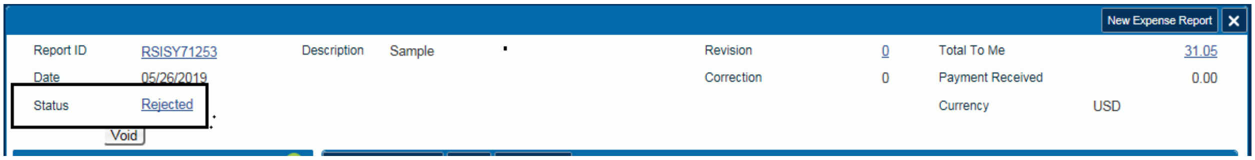


When in Wizard mode, this enhancement ensures that you remain positioned within the Expense section of the Wizard instead of being diverted back to the Default Charges section. However, **Add Charge** is also available in Expert mode.

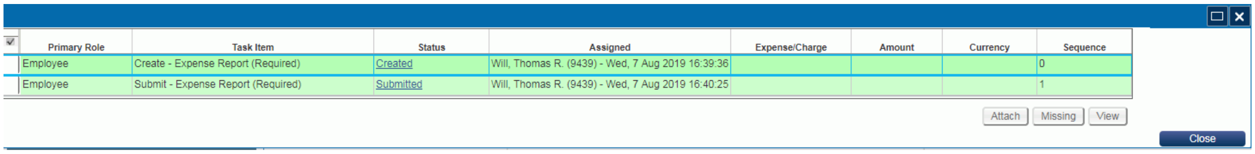
The charge you select rolls up to charge allocations in the header.

Workflow Tab Converted to a Hyperlink

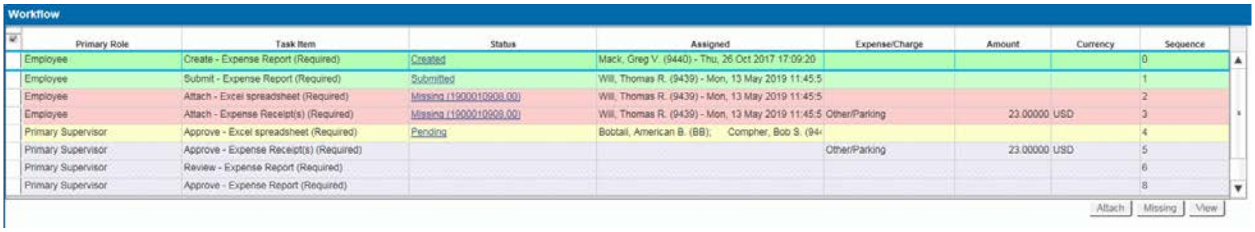
Based on Early Adopter feedback, the Workflow details for expense reports and expense authorizations in both entry modes are now accessed by clicking the **Status** hyperlink, which displays in the header area after basic information is entered and the form is saved successfully.



After you click the hyperlink, the Workflow details display in a pop-up dialog box:



Additionally, in response to Early Adopter feedback, the attachment task displays in red if the attachment is missing.



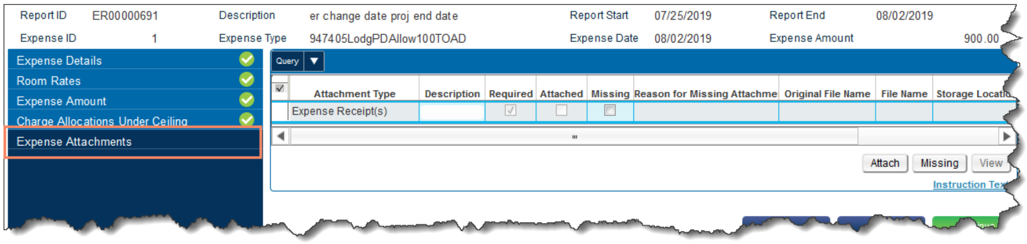
Other colors indicate the following states of completion of various tasks:

- Green – Completed task
- Yellow – Pending task
- No Color – Task not assigned

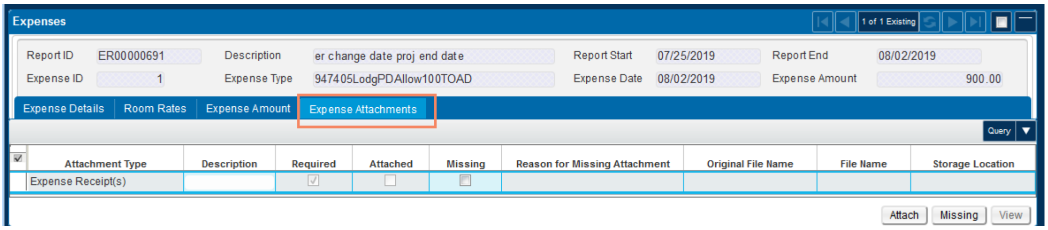
Attachments Subtask Converted to Tab

In both Wizard and Expert modes, Attachments now displays as tab. Prior to this release, Attachments displayed as a subtask link, for example, in the earlier version:

In the revised layout of the Wizard, in Manage Expense Report, for example, the layout displays like this:



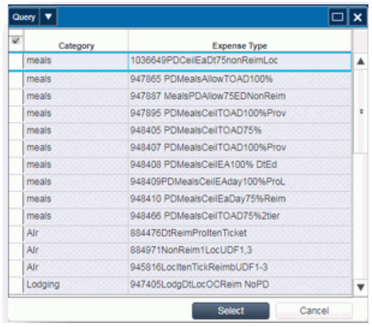
In Expert mode, it displays like this:



Note also that this same layout change also applied to the Manage/Approve Expense Reports and Manage/Approve Expense Authorizations applications.

Expense Type Selection in Wizard Mode

In Wizard mode, the Expense Type and Expense Category are combined as a single Lookup.

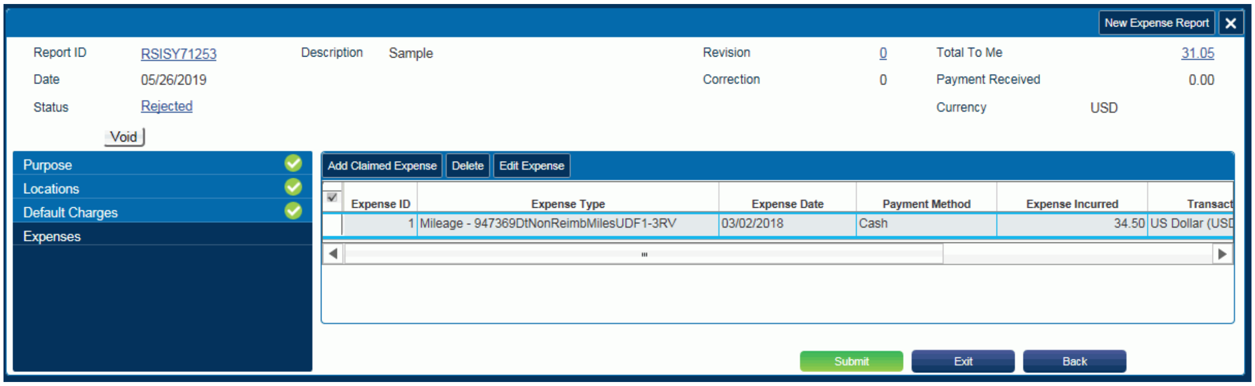
This enhancement was made in response to Early Adopter feedback. Note also that your System Administrator can change this setting to display Expense Category as a separate Lookup. The Lookups are always separate in Expert mode.

Additionally, when viewing or editing a previously added claimed or planned expense, the Expense Type tab does not display in the left pane.

If No Draft Report or Authorization Exists Wizard Opens to New

Based on Early Adopter feedback, when you open Manage Expense Report or Manage Expense Authorization in Wizard mode, the form opens to the Expenses tab if there is an existing report or authorization still in *Draft* status. If there is more than one with a *Draft* status, the display defaults to the last one created.

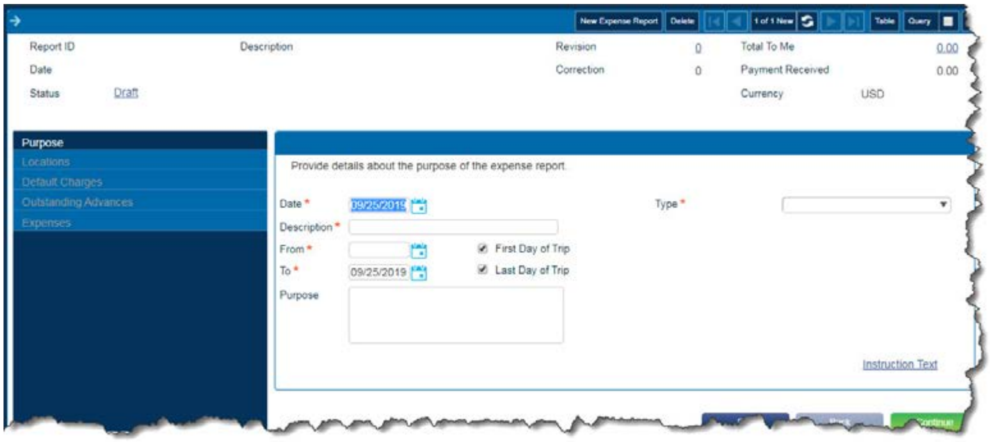
For example, in Manage Expense Report:



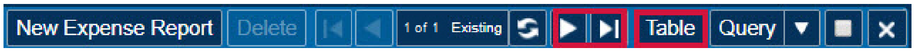
From this point, you can continue with the current report or authorization by adding a new expense or editing and existing one, or click **Submit** to submit the completed form.

To view or modify information on the preceding tabs, click **Back** or click the tab itself in left pane.

If you open either application and there are no reports or authorizations in *Draft* status, the form defaults to a new report or authorization starting in the Purpose tab, where you can begin entering basic information.

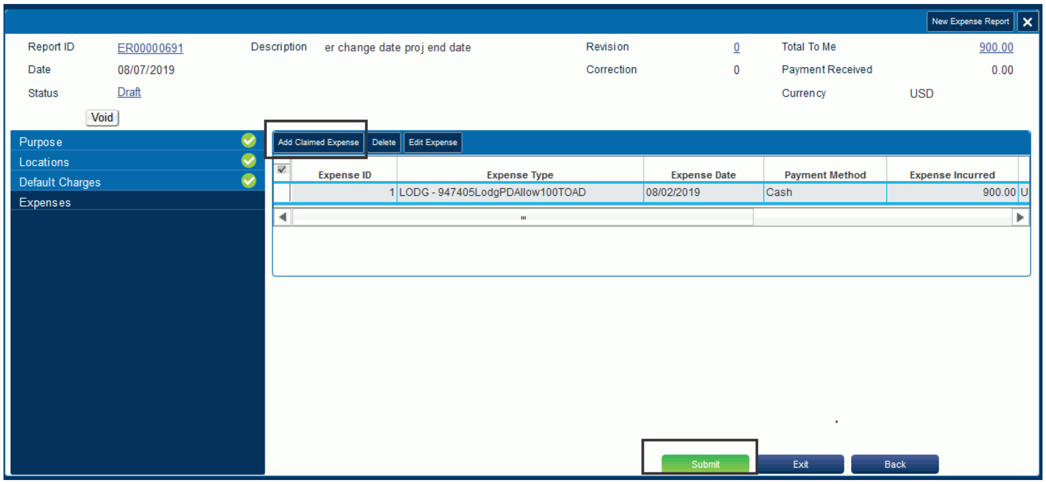


To open a different report or authorization, click  to exit New mode. The toolbar refreshes and the navigation buttons become active, or click Table to select display all.



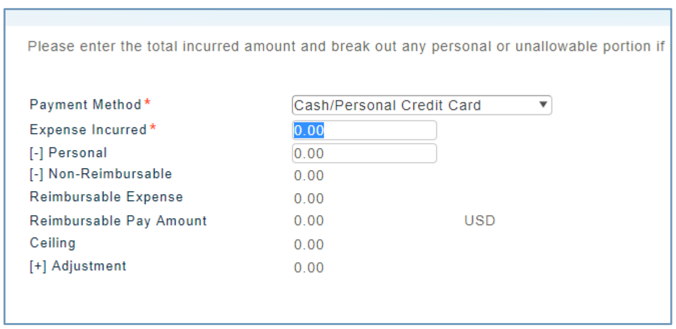
Default Position for Existing for Reports or Authorizations

When you open a previously saved expense report or expense authorization in *Draft* status, the Wizard opens to the Expenses tab. Here you can add a new expense or click **Submit,** as indicated in the following image:



Default Field Focus

In response to Early Adopter feedback, when the next page of the Wizard displays, the insertion point defaults to the first input field with the text highlighted so that you can start typing without having to click an insertion point first. For example:



Clicking **Continue** Automatically Validates Required Fields

In Wizard mode, system validation occurs when you click **Continue** on any screen. Validation ensures that all required fields are completed and that '0.00' is not accepted as a valid entry in amount fields.

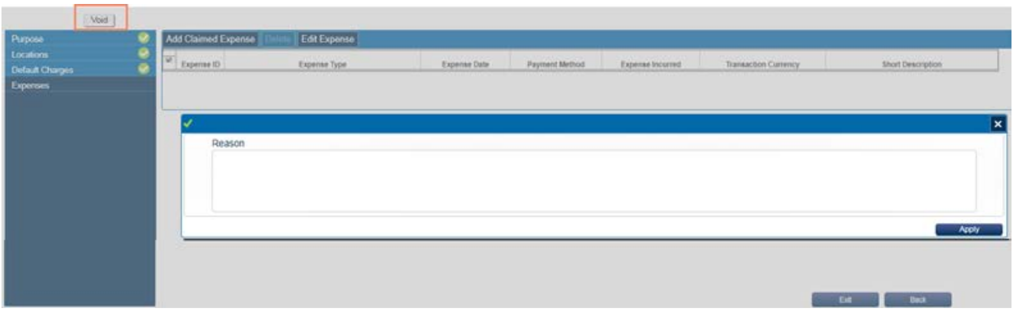
"Success" Messages No Longer Display

In response to Early Adopter feedback, messages indicating that an action was completed successfully do not display in Wizard mode. Instead, messages display only for warnings and errors or when a corrective action is required.

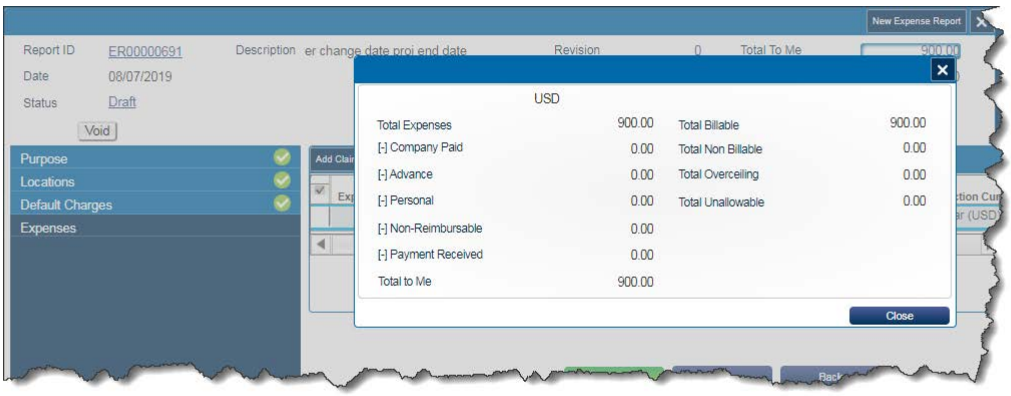
Pop-Up Dialog Box Functionality

To improve usability, the expense report and expense authorization forms now include pop-up dialog box functionality in both the Wizard and Expert modes.

In some cases, the dialog box opens automatically due to a workflow trigger, such as when a rejected or revised form requires an explanation. For example, when you click **Void**, a box displays where you enter the reason for voiding the report.



In other instances, it opens when you click a hyperlink on the interface, such as when you click **Total To Me** in the header area of an expense report to display report details:



Where added, the pop-ups eliminate other interface elements such as tabs or subtasks, which previously required you to navigate to a different location on the form to complete an action or view data.

The specific functions that were converted to pop-up dialog boxes are described below.

Function	Affected Applications	Notes
Revision Explanation	▪ Manage Expense Report ▪ Manage Expense Authorization ▪ Manage/Approve Expense Reports ▪ Manage/Approve Expense Authorizations	Displays if a reason is required for revisions.
Rejection Explanation	▪ Manage Expense Report ▪ Manage Expense Authorization ▪ Manage/Approve Expense Reports ▪ Manage/Approve Expense Authorizations	Displays if a reason is required for rejections.
Void Reason	▪ Manage Expense Report ▪ Manage Expense Authorization ▪ Manage/Approve Expense Reports	Displays if a void explanation is required.

Function	Affected Applications	Notes
	▪ Manage/Approve Expense Authorizations	
Overceiling Explanation	Manage Expense Report	Displays if an overceiling explanation is required.
Report ID	▪ Manage Expense Report ▪ Manage/Approve Expense Reports	Displays details (Class and Charge) about the expense report when the user clicks the hyperlinked ID in the report header.
Authorization ID	▪ Manage Expense Authorization ▪ Manage/Approve Expense Authorizations	Displays details (Class and Charge) about the expense authorization when the user clicks the hyperlinked ID in the report header.
Revision History	▪ Manage Expense Report ▪ Manage Expense Authorization ▪ Manage/Approve Expense Reports ▪ Manage/Approve Expense Authorizations	Displays when user clicks the Revision History hyperlink in the header of the form.
Total To Me (Formerly Details Tab)	▪ Manage Expense Report ▪ Manage/Approve Expense Reports	The Details tab was replaced with a Total To Me hyperlink in the header area of the form.
View Per Diem Rates	▪ Manage Expense Report ▪ Manage Expense Authorization	Displays when you click the View hyperlink in the View Rates column on the Locations tab.
Status Change	▪ Manage/Approve Expense Reports ▪ Manage/Approve Expense Authorizations	When an authorized role revises a signed expense report or expense authorization, this pop-up displays the question of whether to change the status back to *Draft*.

If you also use the Time module, note that pop-up dialog box functionality was included in this release for the functions described in the table below.

Function	Affected Applications	Notes
Correction Request	Manage Timesheet	Displays when the user requests approval to correct a timesheet. .
Revision Explanation	▪ Manage Timesheet ▪ Manage/Approve Timesheets	Displays if a reason is required for revisions.
Rejection Explanation	▪ Manage/Approve Timesheets	Displays if a reason is required for rejections.
Correction Request	Manage Timesheet	Displays when the user requests approval to correct a timesheet. The pop-up includes a text window where the explanation is entered.
Line Level Approval – Approved Lines	▪ Manage Timesheet ▪ Manage/Approve Timesheets	This pop-up displays information about a timesheet line that has been approved displays in pop-up dialog box.
Line Level Approval – Rejected Lines	▪ Manage Timesheet ▪ Manage/Approve Timesheets	This pop-up displays information about a timesheet line that has been rejected displays in pop-up dialog box.
Line Level Approval – Pending Lines	▪ Manage Timesheet ▪ Manage/Approve Timesheets	This pop-up displays information about a timesheet line that is pending approval displays in pop-up dialog box

Other Layout Improvements

In response to Early Adopter feedback, the following updates were made to the Expense wizard interface.

Improved Visibility for Wizard Navigation Buttons

Navigation button visibility was improved.

Submit Button Repositioned

On the last step of the Wizard, the **Save Expense** button now displays at bottom right.

Back Button Disables When Not Valid

Though the **Back** button still displays on the form even when it is not valid for a given step, its display is dimmed so that, while still remaining visible, it is nevertheless clearly disabled.

Wizard Navigation Button Updates

In response to Early Adopter feedback, labels for navigational buttons are dynamically updated to suit the current step in process. For example, when the form is ready to be saved, the buttons display as **Save Authorization** or **Save Report** instead of as **Save and Continue**.

The button for creating a new report or authorization is **New Expense Report** or **New Expense Authorization**, respectively. Note also that button that advances you to the next step is always green (for example, Continue).

Reset Default Positioning Button Disabled

To ensure that users do not lose completed work, the **Reset Default Positioning** button disables in Wizard mode.

Expense Report Wizard Updates

Changes described in this section apply only to Manage Expense Report.

Details Tab Converted to Hyperlink

Information that previously displayed on the Details tab now displays in a pop-up dialog box when you click the **Total to Me** hyperlink in the header area of the form. This change was made in both Expert and Wizard modes. The dialog box displays the following fields:

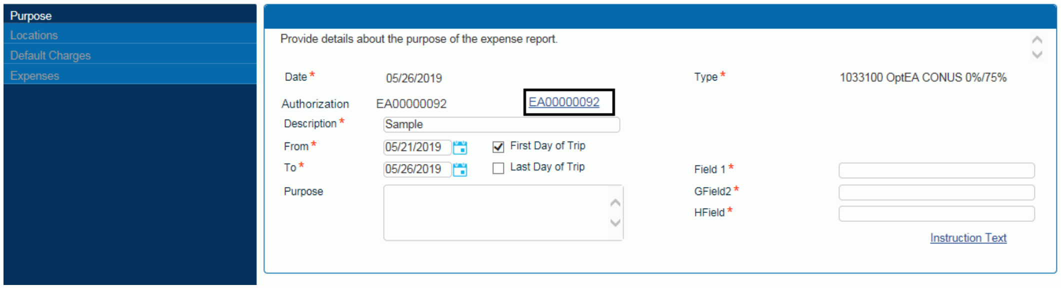
- Total Expenses
- [-] Company Paid
- [-] Advance
- [-] Personal
- [-]Non-Reimbursable
- [-] Payments Received
- Total To Me
- Total Billable
- Total Non Billable
- Total Over Ceiling
- Total Unallowable

Descriptions of these fields are available from the online Help

Note that this update was also applied to the Manage/Approve Expense Reports application.

Authorization ID Converted to Hyperlink

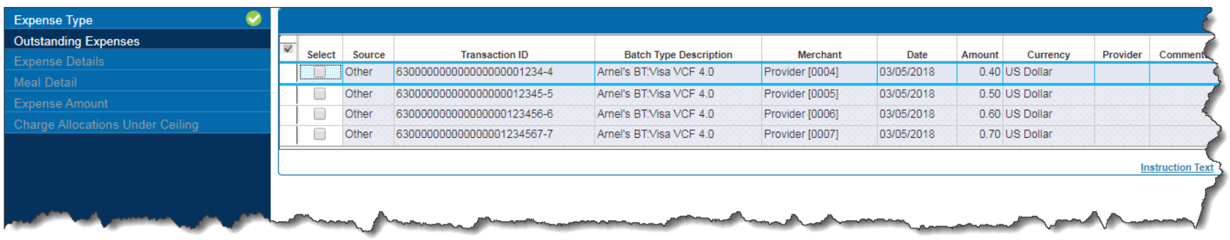
The ability to open an associated expense authorization from an expense report is now controlled by a hyperlink on the Purpose tab.



Previously, the expense authorization was opened by clicking the **Launch** button.

Outstanding Expenses Converted to Table

In Wizard mode, the selection of outstanding expenses is a separate step, completed after you select the expense type. To make selection easier, the expenses now display in table format. For example:



Note that in Wizard mode this table is not editable. It is editable in Expert mode.

Labels Updated on Claimed Expenses Section

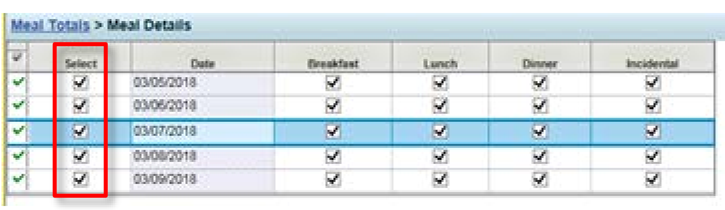
Labels on the Claimed Expenses section of the form were updated as follows:

- “Claimed Expenses” was changed to “Expenses.”
- “Details” was changed to “Expense Details.”
- “Amount” was changed to “Expense Amount.”

These changes apply to both Wizard and Expert modes.

Date Selection Updates to Meal Details

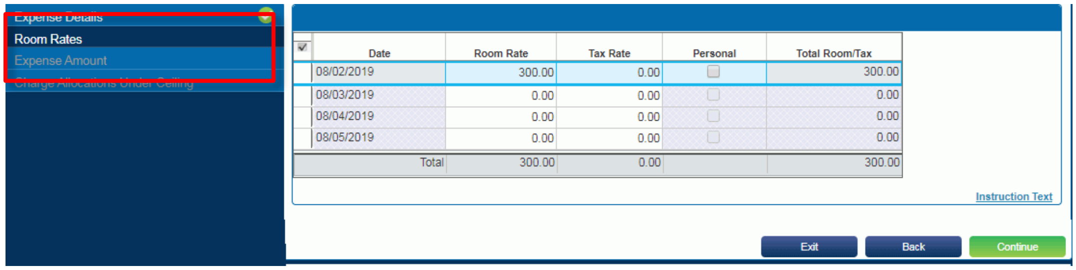
When an expense report includes multiple dates for meal allowances for only a single location, all the dates are now selected by default. For example:



If the expense report includes multiple locations, the Meal Details table now only displays dates per location, where previously the table displayed date rows for the entire period covered by the expense report.

Updates to Room Rates

To properly gather lodging expenses and per diem calculations for ceilings and allowances, the Room Rates tab displays before the Expense Amounts tab.



Additionally, when the lodging expense includes multiple locations, the Room Rates table now displays dates per location, where previously the table displayed date rows for the entire period covered by the expense report.

Other Lodging Validation

In response to Early Adopter feedback, the Wizard indicates whether you are missing information in a step before allowing you to proceed.

Reuse Attachment Provided for Main Lodging Expense

When a lodging expense generates a child lodging expense, any receipt that was attached to the main lodging expense is now automatically attached to the child expense so that you do not have to reattach it.

Copy Option Removed from Claimed Expenses

In response to Early Adopter feedback, the **Copy** button was removed from the Claimed Expenses area of the form.

Save and Continue Button Renamed

In response to Early Adopter feedback, the **Save and Continue** button instead displays as **Continue** when the expense report is view-only.

Correct an Expense Report in Wizard Mode

In Wizard mode, after you click **Correct** to correct a processed expense report, a Save message no longer displays. This change streamlines the correction process by reducing the number of mouse clicks. After you click **Correct**, the status of the expense report changes to *Approved* and the expense report is available for updating.

Expense Authorization Wizard Updates

Details Tab Removed

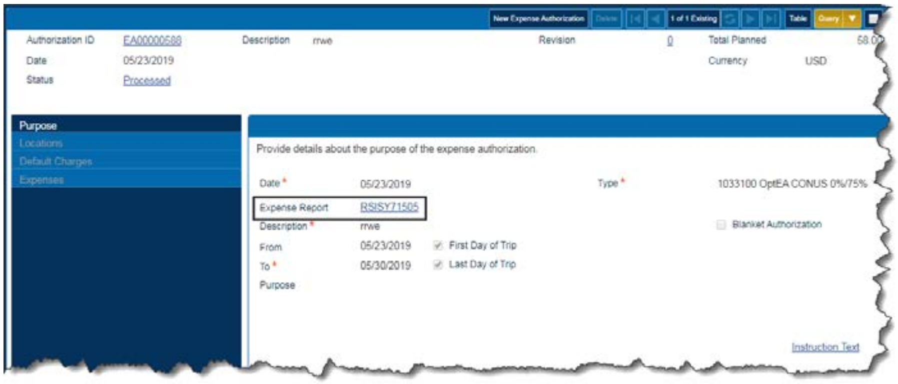
The Details tab was removed from both the Wizard and Expert modes. The table below describes the new location of each field that previously displayed on the tab:

Field on Details Tab	New Location of Field
Class	Displays in a pop-up dialog when you click the Authorization ID hyperlink in the header area.
Revision	Displays in the header area. The hyperlinked revision number opens the Revision History dialog box.
Total Planned	Displays in the header area.
Charge	Displays in a pop-up dialog when you click the Authorization ID hyperlink in the header area.
Notes	Converted to a tab. Displays only if there are notes.
Revision Explanation	Displays in a pop-up dialog box after you click the Revision hyperlink in the header.
Change to Draft Status	Displays as a pop-up dialog box when an authorized role revises a signed expense authorization.
Submit	In Expert mode this button displays in the header area. In Wizard mode, it is incorporated as a separate step.

Note that this update was also applied to the Manage/Approve Expense Authorizations application.

Expense Report ID Converted to Hyperlink

The ability to open an associated expense report from an expense authorization is now controlled by a hyperlink link on the Purpose tab.



Previously, the expense report was opened by clicking the **Launch** button.

Planned Expenses Labels Updated

Labels on the Planned Expenses section of the form were updated as follows:

- “Planned Expenses” was changed to “Expenses.”
- “Details” was changed to “Expense Details.”

These changes apply to both Wizard and Expert modes.

Expense Wizard Administration

This section describes Expense Wizard configuration options and other configuration updates. Information in this section is for System Administrators only.

Set Expense Wizard as the Default Layout for a UI Profile

Following installation of this release, the standard layout (referred to as Expert Mode) remains the default layout in both Manage Expense Report and Manage Expense Authorization.

Individual users can select Expense Wizard as the default layout from User Preferences. As a System Administrator, you can set Expense Wizard as the default layout for any UI Profile.

To set Expense Wizard as the default layout for UI profile, complete the following steps:

1. Close all applications and click .
2. Select the UI profile you want to modify and click **Manage Profile**.
3. Click **Expense » Expense Reports » Manage Expense Report** to display the Manage Expense Report application.
4. If the Wizard interface is not displayed, click to switch from Expert mode to Wizard mode.
5. Click and click **Save** to the right of **Application Layout Changes**.
6. Close the application to exit.
7. Click and click **Exit Profile**.

To learn more about User Profiles, see **Admin System Administration » Workspace Customization » Manage User Profiles**.

Optional Configuration Settings

The General Options tab of the **Expense » Expense Controls » Manage Expense Report Types** application includes two new optional settings:

- **Wizard Mode – Expose Expense Category Lookup –** This option controls whether the Expense Type and Expense Category are combined in a single Lookup or whether they display as two separate Lookups. The combined Lookup is the default display in Wizard mode.

  Select this option to display Expense Type and Expense Category as two separate Lookups. This results in a shorter list of expense types from which to choose, but does require an additional step for the user when entering an expense.
- **Wizard Mode – Require Attachments Prior to Submit –** Select this option to require that users complete outstanding attachment tasks prior to submitting the expense report.

Customize Wizard Page Description and Instruction Text

Expense configuration was updated to provide System Administrators with the ability to customize the page description and instruction text that displays on various Expense Wizard pages.

Text customization is accomplished from a new Custom Text subtask available in these applications:

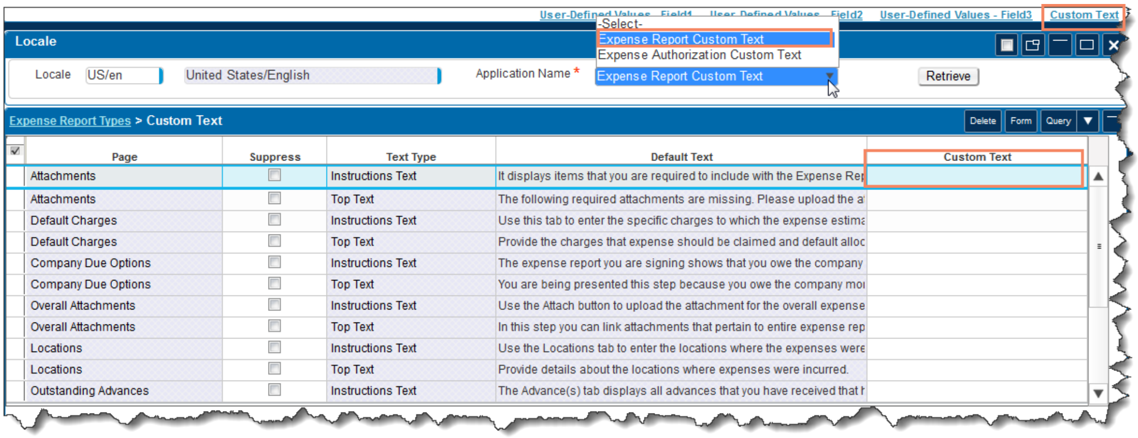
- **Expense Controls » Manage Expense Types –** Use the Custom Text subtask to modify the default text that displays based on a selected expense type.

- **Expense Controls » Manage Expense Report Types –** Use the Custom Text subtask to modify the default text that displays based on a selected expense report type.

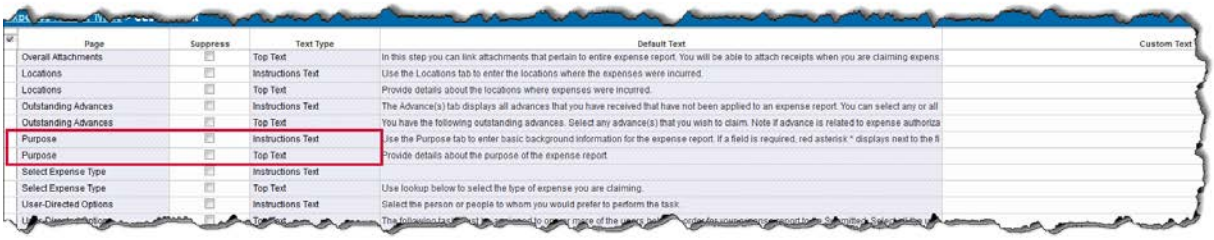
Overview

In both applications, the subtask configuration options are controlled separately by locale and the application, either Expense Report or Expense Authorization.

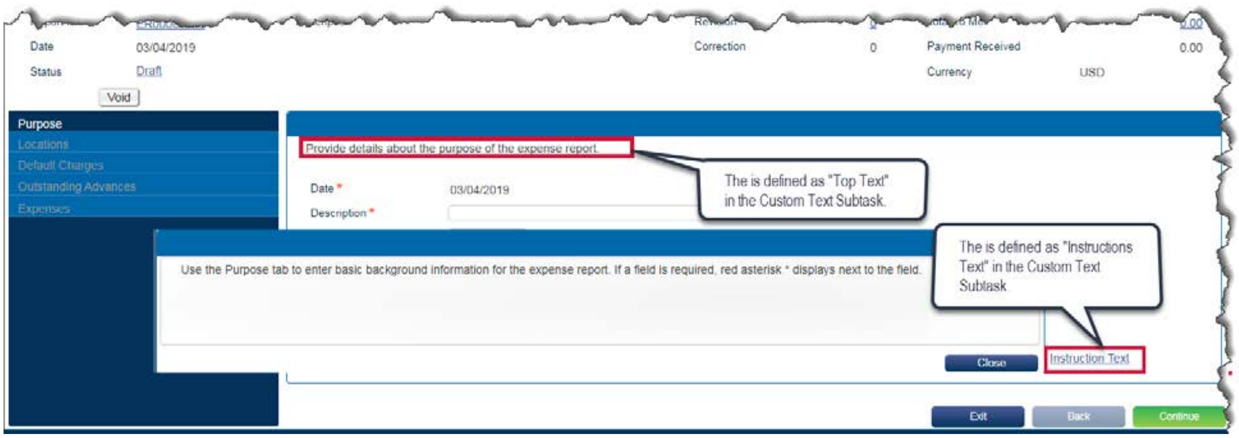
For example, in Manage Expense Report Types, the Custom Text subtask displays as:



As an example, the default text for Purpose in the Custom Text Subtask of Manage Expense Report Types displays two rows: one for the text that will display when the user clicks the Instruction Text hyperlink and another for the descriptive text that will show at the top of the Purpose tab. For example:



On the Purpose tab, it displays as:



Modify Default Text

The steps for modifying the default text are the same in both applications.

To customize page descriptions or instructional text:

1. Query to locate the record you want to update. For example:
   - In Manage Expense Types, you might select a transportation or lodging wizard.
   - In Manage Expense Report type, you might select the code for a per diem expense type.
2. Click the **Custom Text** subtask link.
3. In **Locale**, click 🔍 to select a different locale if necessary.
4. From the **Application Name** drop-down list, choose from the following:
   - Expense Report Custom Text
   - Expense Authorization Custom Text
5. Click **Retrieve**.

   The Custom Text table updates with the options you selected.
6. In the Custom Text table, select the row that displays the page you want to update.

   Note that in Manage Expense Types, the table includes a **Wizard Type** column that displays the name of the Wizard Type associated with the record you selected in Step 1.
7. In the Custom Text field, click to open the text box or type directly in the field.
8. Modify other pages as needed.
9. Click when you are done.

Note also that for any row, you can suppress text from displaying by selecting the **Suppress** check box.

Customizable Pages

This section describes pages available for customization in the Custom Subtask of both applications.

Customizable Pages in Manage Expense Type

In Mange Expense Types, the table in the Custom Text subtask includes a Wizard Type column, and the pages available for customization vary by Wizard Type. In the table below, pages common to all the wizard types are listed first, and pages unique to each wizard type are listed after.

Expense Report	Expense Authorization
Pages common to all wizard types include: Outstanding Expenses Expense Attachments Charge Allocations Expense Details Expense Amounts	Expense Attachments Charge Allocations Expense Details

Expense Report	Expense Authorization
Expense Taxes	
Entertainment Wizard Type: Attendees Details Expense Meal	
Lodging Wizard Type: Other Lodging Expenses Room Rates	
Meals Wizard Type: Attendees Details Expense Meal	
Mileage Wizard Type Expense Details (Other)	
Other Wizard Type Expense Details Other	

Customizable Pages in Manage Expense Report Types

In Manage Expense Report Types, the pages that are available in Custom Text subtask include:

Expense Report	Expense Authorization
Attachments	Advances Request
Default Charges	Attachments
Company Due Options	Default Charges
Overall Attachments	Overall Attachments
Locations	Locations
Outstanding Advances	Purpose
Purpose	Select Expense Type
Select Expense Type	User-Directed Options

Expense Report	Expense Authorization
User-Directed Options	

General Configuration Updates

As part of this release, **Time & Expense » Configuration » General Controls » Configure General Settings** screen was updated with one change unrelated to Expense Wizard, and one change related to the Custom Text enhancement.

User Authentication Method Now Derived from Costpoint

The **Authentication Method** field was removed from the General Options tab of **Time & Expense » Configuration » General Controls » Configure General Settings** screen.

When you add a new employee to Time & Expense, you will enable security options from the Authentication tab of the **Costpoint » Admin » Security » System Security » Manage Users** screen.

Custom Text

If you add a new locale on the General Options tab of **Configuration » General Controls » Configure General Settings**, that locale is made available for selection in the Custom Subtask in the following applications:

- Manage Expense Types
- Manage Expense Report Types

.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com