Deltek Costpoint® 7.1.1

Release Notes: Subcontractor Management

June 27, 2016

This edition published June 2016.

Contents

Overview

Welcome to the Deltek Costpoint 7.1.1 Release Notes: Subcontractor Management. This guide discusses the new enhancements available in this release.

Deltek releases the Subcontractor Management feature, which integrates Deltek Costpoint 7.1.1 with Deltek Time & Expense 10, to allow companies to better manage subcontractor agreements. With this feature, prime contractors have the ability to search and source subcontractor resources (vendor employees) with the correct skills, training, and security requirements. They can bring those resources onboard much like regular employees, capturing their time and billing the project based on the resources' time. They can use Time & Expense to record and approve the subcontractor resources' labor/expenses, and use Costpoint to create subcontractor invoices for the services provided.

Deployment Requirement: Because the Subcontractor Management feature utilizes a direct integration between Costpoint and Time & Expense, to use the Subcontractor Management functionality, you must use a shared Costpoint 7.1.1 and Time & Expense 10 deployment model (for example, your Costpoint database and Time & Expense database must be part of a single system).

A new Resources subtask is now available in some applications in the Materials domain. Clients can use this new subtask to request for quotes and for requisitions to help with the search for subcontractor resources. They can also use this subtask to request information about the subcontractor resources, including security requirements, skills, training, resource rate, and the availability of the specific resource. Three new types of purchase order (for subcontractor agreement) have also been added.

The Vendor Employee management in the Accounting domain has been expanded to accommodate subcontractor resource information. A vendor employee import process has also been added to help with the onboarding process. Once the subcontractor resources have been approved, they can be assigned to work assignments.

In the Projects domain, a new module, Subcontractor Management, has been added to hold the new applications created for this feature. This module and the screens under it are available only if the client is licensed for Subcontractor Management.

The applications included in the new module are used to configure control settings for subcontractor management, create and approve work assignments, and manage and approve subcontractor invoices. Work assignments contain the business rules that determine who can charge against the subcontractor agreement purchase order, how much they can charge, what they can charge, and when they can charge. Once the work assignment is approved, subcontractor resources will be able to enter time and record expenses in Time & Expense. Transactions that are in excess or outside the period of performance may be flagged as “at risk” based on the business rules set in the work assignment. After the timesheets and expense records are approved, they will be exported to Costpoint, where the prime contractor can create a subcontractor invoice. Once the invoice is approved by the subcontractor and prime subcontractor, it becomes a purchase order voucher. This voucher undergoes the normal voucher approval process. Once approved, it can be posted to relieve the purchase order commitments and is ready to be billed to the customer.

Several applications are updated in the Administration domain to accommodate the changes for the new settings screens.

In the People domain, a number of enhancements are also applied to support the Subcontractor Management feature in the transfer of employee data from Costpoint to Time & Expense.

Patch Requirements

The following patches are required for this release:

- 2632
- 2653
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- 2874
- 2875
- 2888
- 2890
- 2892
- 2893
- 2902
- 5037
- 5038
- 7062
- 7064
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- 7074
- 7076
- 7079
- 7085
- 7086
- 7088

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application Name	Application ID	Application JAR
Accounting	AP	Import Vendors	AOPUTLVU	cp711_aoputlvu_008.jar
Accounting	AP	Approve Vendor Employees	APMAPRVE	cp711_apmaprve_001.jar
Accounting	AP	Manage SCI/SAP Clearance Codes	APMCLRCD	cp711_apmclrcd_001.jar
Accounting	AP	Manage Security Clearance Settings	APMSCSET	cp711_apmscset_001.jar
Accounting	AP	Configure Accounts Payable Settings	APMSETNG	cp711_apmsetng_002.jar
Accounting	AP	Configure Vendor Settings	APMSETVN	cp711_apmsetvn_001.jar
Accounting	AP	Manage Vendor Employee Approval Groups	APMVEGRP	cp711_apmvegrp_001.jar
Accounting	AP	Manage Vendor Employees	APMVEMPL	cp711_apmvempl_001.jar
Accounting	AP	Manage Vendors	APMVEND	cp711_apmvend_003.jar

Domain	Module	Application Name	Application ID	Application JAR
Accounting	AP	Post Vouchers	APPPOSTV	cp711_apppostv_006.jar
Accounting	AP	Create Recurring Accounts Payable Vouchers	APPRECVR	cp711_apprecvr_005.jar
Accounting	AP	Reverse Posted Vouchers	APPREVVR	cp711_apprevvr_002.jar
Accounting	AP	Import Vendor Employees	APPUTLVE	cp711_apputlve_001.jar
Accounting	AP	Manage Company Property	HPMPROP	cp711_hpmprop_001.jar
Accounting	AP	Manage Skill Codes	HPMSKILL	cp711_hpmskill_001.jar
Accounting	AP	Manage Skill Level Codes	HPMSLVL	cp711_hpmslvl_001.jar
Accounting	AP	Manage Training Codes	HPMTRAIN	cp711_hpmtrain_001.jar
Accounting	AP	Manage Training Source Codes	HPMTRNS	cp711_hpmtrns_001.jar
Accounting	AP	Manage Purchase Order Vouchers	POMPOVCH	cp711_pompovch_016.jar
Accounting	AP	Create PO Vouchers from POs/Receipts	POPPOVCH	cp711_poppovch_004.jar
Accounting	AP	Print Vendor Employee Detail Report	APRVEMPL	cp711_ aprvempl_001.jar
Accounting	AP	Import Purchase Order Vouchers	AOPPOVCH	cp711_aoppovch_010.jar
Projects	SM	Approve Subcontractor Invoices	SMMAINVC	cp711_smmainvc_001.jar
Projects	SM	Manage Subcontractor Invoices	SMMMINVC	cp711_smmminvc_001.jar
Projects	SM	Manage Work Assignment Approval Codes	SMMSETA	cp711_smmseta_001.jar
Projects	SM	Configure Subcontractor Management Settings	SMMSETNG	cp711_smmsetng_001.jar
Projects	SM	Manage Work Assignments	SMMWRK	cp711_smmwrk_001.jar
Projects	SM	Manage Work Assignment Roles	SMMWROLE	cp711_smmwrole_001.jar
Projects	SM	Create Subcontractor Invoices	SMPINVC	cp711_smpinvc_001.jar
Projects	SM	Approve Work Assignments	SMPWRKA	cp711_smpwrka_001.jar

Domain	Module	Application Name	Application ID	Application JAR
Projects	SM	View Work Assignment Status	SMQWA	cp711_smqwa_001.jar
Projects	SM	Print Subcontractor Invoices	SMRINVC	cp711_smrinvc_001.jar
Projects	SM	Print Work Assignment Detail Report	SMRWRK	cp711_smrwrk_001.jar
People	LD	Configure Labor Settings	LDMLABOR	cp711_ldmlabor_003.jar
People	LD	Export Data To Deltek Time and Expense	LDPDTC	cp711_ldpdtc_004.jar
Materials	PP	Import Vendor Quotes	AOPQTV	cp711_aopqtv_005.jar
Materials	PP	View Item Purchasing Information	POQITEM	cp711_poqitem_003.jar
Materials	PP	Assign Purchase Requisition Lines to Buyers	PPMBUYAL	cp711_ppmbuyal_003.jar
Materials	PP	Assign Purchase Requisitions to Buyers	PPMBUYAS	cp711_ppmbuyas_004.jar
Materials	PP	Manage Vendor Quotes By Item	PPMQTI	cp711_ppmqti_003.jar
Materials	PP	Manage Vendor Quotes By Vendor	PPMQTV	cp711_ppmqtv_004.jar
Materials	PP	Manage Request for Quotes By Item	PPMRFQI	cp711_ppmrfqi_004.jar
Materials	PP	Manage Request for Quotes By Vendor	PPMRFQV	cp711_ppmrfqv_004.jar
Materials	PP	Approve Purchase Requisition Lines	PPMRQAPL	cp711_ppmrqapl_006.jar
Materials	PP	Approve Purchase Requisitions	PPMRQAPX	cp711_ppmrqapx_007.jar
Materials	PP	Apply PO Info to Purchase Requisitions by Line	PPMRQLN	cp711_ppmrqln_010.jar
Materials	PP	Configure Purchase Requisition Print Options	PPMRQOP	cp711_ppmrqop_001.jar
Materials	PP	Create Purchase Orders	PPPGPO	cp711_pppgpo_009.jar
Materials	PP	Compute Vendor Performance	PPPVNDP	cp711_pppvndp_003.jar

Domain	Module	Application Name	Application ID	Application JAR
Materials	PP	View Purchase Requisition Status	PPQRQSTS	cp711_ppqrqsts_003.jar
Materials	PP	View Vendor Quotes	PPQVQT	cp711_ppqvqt_002.jar
Materials	PP	Print Request for Quotes	PPRPRRFQ	cp711_pprprrfq_004.jar
Materials	PP	Print Purchase Requisitions	PPRPRRQ	cp711_pprprrq_003.jar
Materials	PP	Import Purchase Requisitions	AOPRQPP	cp711_aoprqpp_006.jar
Materials	PO	Import Subcontract Retainage PO Status Updates	AOPSCST	cp711_aopscst_003.jar
Materials	PO	Import Purchase Orders	AOPUTLPO	cp711_aoputlpo_008.jar
Materials	PO	Manage Buyers	POMBUY	cp711_pombuy_001.jar
Materials	PO	Create Purchase Order Change Orders	POMCHNG	cp711_pomchng_004.jar
Materials	PO	Expedite Purchase Orders	POMEXPD	cp711_pomexpd_003.jar
Materials	PO	Manage Purchase Orders	POMMAIN	cp711_pommain_017.jar
Materials	PO	Configure Purchase Order Print Options	POMPOPTS	cp711_pompopts_003.jar
Materials	PO	Create Blanket Purchase Order Releases	POMRELS	cp711_pomrels_008.jar
Materials	PO	Update Subcontract Retainage PO Status	POMSCST	cp711_pomscst_005.jar
Materials	PO	Manage Statement of Work	POMSOW	cp711_pomsow_001.jar
Materials	PO	Manage Statement of Work Types	POMSOWTP	cp711_pomsowtp_001.jar
Materials	PO	Approve Pending Purchase Orders	POMSTAT	cp711_pomstat_004.jar
Materials	PO	Archive Purchase Orders	POPARCH	cp711_poparch_004.jar
Materials	PO	Compute/Print Purchasing Commitments	POPCOMM	cp711_popcomm_004.jar
Materials	PO	Reconcile Purchase Orders	POPRECON	cp711_poprecon_007.jar
Materials	PO	View Purchase Order Change Orders	POQCHNG	cp711_poqchng_002.jar

Domain	Module	Application Name	Application ID	Application JAR
Materials	PO	View Purchase Order Status	POQSTAT	cp711_poqstat_005.jar
Materials	PO	Print Purchase Order Expediting Report	POREXPD	cp711_porexpd_003.jar
Materials	PO	Print Purchase Order Change Orders	PORPCO	cp711_porpco_005.jar
Materials	PO	Print Purchase Orders	PORPPO	cp711_porppo_011.jar
Materials	PO	Print Purchase Order Register Report	PORREG	cp711_porreg_004.jar
Materials	RC	Manage Quality Control Inspections	RCMINSP	cp711_rcminsp_009.jar
Materials	RC	Manage Purchase Order Receipts	RCMPORC	cp711_rcmporc_011.jar
Materials	RC	Configure Receiving Settings	RCMSET	cp711_rcmset_001.jar
Administration	SY	Set Up Company	SYPCOMP	cp711_sypcomp_005.jar
Administration	SY	Rebuild Global Settings	SYPSTNG	cp711_sypstng_001.jar

Accounting Domain

This section includes summaries of changes made in relation with the Subcontractor Management feature within the Costpoint Accounting domain.

Maintenance, Approval, and Import of Subcontractor Resource

The management of Vendor Employee information has been expanded to capture the required information to handle subcontractor resources. Costpoint now supports the process to approve and import Vendor Employee information.

Manage Vendor Employees (APMVEMPL)

Use this new application (**Accounting » Accounts Payable » Vendors » Manage Vendor Employees**) to manage subcontractor employees so they can be given authorization to work and charge labor and/or expenses in the prime contractor's Time & Expense system. This application also supports onboarding of Vendor Employees.

Approve Vendor Employees (APMAPRVE)

Use this new screen (**Accounting » Accounts Payable » Vendors » Approve Vendor Employees**) to approve Vendor Employees. It is only available when:

- Your organization is licensed for Subcontractor Management.
- On the Configure Accounts Payable Settings screen, the **Requires Approval** check box in the **Subcontractor Vendor Employee Approval** group box is selected.
- If the **Use Vendor Employee Approval Groups** check box is clear and approvals are required, then anyone with rights to the Approve Vendor Employees screen can approve vendor employees.

Import Vendor Employees (APPUTLVE)

Use this new application (**Accounting » Accounts Payable » Accounts Payable Interfaces » Import Vendor Employees**) to import Vendor Employee data from comma-separated input files into Costpoint. You can only import Vendor Employee data for existing vendors.

The following are included in the imported Vendor Employee data:

- Subcontractor management and contacts information
- Labor information and history, including default transactional invoice rates
- Security clearances, including SCI/SAP clearances
- Skills
- Trainings
- Properties

Manage Vendors (APMVEND)

Similar with the Manage Vendor Employees (APMVEMPL) screen, the Manage Vendors application can now support the onboarding and management of subcontractor employees. Such employees can be authorized to work and charge labor or expenses in the prime contractor's Time & Expense system.

Import Vendors (AOPUTLVU)

The Import Vendors application now supports the Vendor Employee approval process, where approvals can be done by means of the Vendor Employee Approval Groups which can be added for a Vendor. In addition, the **Subcontractor** flag and **Vendor Employee Approval Group** code are now part of the Import Vendor Edit Report, which are also on the Manage Vendors application.

Subheadings in Accounts Payable » Vendors

The following subheadings were added to the **Accounts Payable** » **Vendors** menu path:

- Vendors
- Vendor Employees

Print Vendor Employee Detail Report (APRVEMPL)

You can now print detailed information about vendor employees through the new Print Vendor Employee Detail Report application (**Accounting » Accounts Payable » Vendors » Print Vendor Employee Detail Report**). You can select which information to include in the report, such as Security Clearances, Skills, and Work Assignment charges.

Configuration Settings for Subcontractor Management

Manage SCI/SAP Clearance Codes (APMCLRCD)

Use this new screen (**Accounting » Accounts Payable » Vendor and Subcontractor Controls » Manage SCI/SAP Clearance Codes**) to set up security clearance codes for Sensitive Compartmented Information (SCI) and/or Special Access Program (SAP).

Existing Applications Now in the Accounts Payable Module

The following applications found in the Costpoint People domain were added in the Accounts Payable module to support the Subcontractor Management feature:

- **Manage Company Property (HPMPROP)** — This application tracks property that can be assigned to resources (Vendor Employees).
- **Manage Training Codes (HPMTRAIN)** — This application tracks trainings that can be linked to Vendor Employees.
- **Manage Skill Level Codes (HPMSLVL)** — This application tracks skill levels that are linked to the Skill Codes.
- **Manage Skill Codes (HPMSKILL)** — This application tracks skills that can be linked to Vendor Employees.
- **Manage Training Source Codes (HPMTRNS)** — This application tracks training sources that are linked to Training Codes.

Manage Security Clearance Settings (APMSCSET)

Use this new screen (**Accounting » Accounts Payable » Vendor and Subcontractor Controls » Manage Security Clearance Settings**) to manage the security clearance codes and the level of security clearance for Vendor Employees. You can assign a hierarchy to use for the security clearance code to determine the security clearance level assigned to a Vendor Employee. The hierarchy is used to verify that vendor employees assigned to the Work Assignment meet the minimal security requirements.

Also, this screen is now available in the Materials domain (**Materials » Purchasing » Purchasing Codes**).

You can only use this screen if you are licensed for Subcontractor Management.

Manage Vendor Employee Approval Groups (APMVEGRP)

This new application (**Accounting » Accounts Payable » Vendor and Subcontractor Controls » Manage Vendor Employee Approval Groups**), which supports the approval of Vendor Employees, is now available. This configuration screen allows you to link users to Vendor Employee approval groups that are also linked to vendors. In this way, you can set controls on who can approve subcontractor resources.

Configure Vendor Settings (APMSETVN)

Configure options that allow auto-assignment of Vendor Employee IDs are now available in the Configure Vendor Settings application. Timesheet defaults required by Time & Expense are also available.

Configure Accounts Payable Settings (APMSETNG)

The Configure Accounts Payable Settings application now supports the Subcontractor Management feature. This application now has configuration options for Vendor Employee approval requirements.

Generation of Subcontractor Invoice for Approval of Subcontractor

Post Vouchers (APPPOSTV)

The Post Vouchers application now updates the new VCHR_LAB_TS_HS table. In addition, there are new columns in the following tables:

- VCHR_HDR
- VCHR_LN
- VCHR_LN_ACCT
- VCHR_LAB_VEND

The application now retrieves the new standard text tables for purchase order vouchers. This application updates the following tables:

- VCHR_HDR_TEXT
- VCHR_HDR_TEXT_HS

Also, the new SALES_TAX_FL in the VCHR_LAB_VEND and VCHR_LAB_VEND_HS tables is now supported by the Post Vouchers application.

Reverse Posted Vouchers (APPREVVR)

The Reverse Posted Vouchers application now updates the new VCHR_LAB_VEND_TS_HS table. There are also new columns in the following tables:

- VCHR_HDR_HS
- VCHR_LN_HS

- VCHR_LN_ACCT_HS
- VCHR_LAB_VEND_HS

This application now picks up new standard text tables for purchase order vouchers and updates the following tables:

- VCHR_HDR_TXT
- VCHR_HDR_TXT_HS

The Reverse Posted Vouchers application now supports the SALES_TAX_FL in the VCHR_LAB_VEND and VCHR_LAB_VEND_HS tables.

Create Recurring Accounts Payable Vouchers (APPRECVR)

The recurring voucher now retrieves purchase order vouchers that are subcontract invoices.

Manage Purchase Order Vouchers (POMPOVCH)

The Manage Purchase Order Vouchers application now supports subcontractor agreement invoices. You can also use this screen to create new vouchers for subcontractor agreement purchase orders.

Create PO Vouchers from POs/Receipts (POPPOVCH)

The Subcontractor Agreement Blanket Purchase Order Types are excluded in the Create PO Vouchers from POs/Receipts application for processing. PO Types of Subcontractor Agreement and Subcontractor Agreement Release are still allowed.

Import Purchase Order Vouchers (AOPPOVCH)

You can now create vouchers based on imported timesheet information via a new input file. You can do this for purchase orders with the Subcontractor Agreement and Subcontractor Agreement Release types.

Projects Domain

This section includes summaries of changes made in relation with the Subcontractor Management feature within the Costpoint Projects domain.

Control Settings for Subcontractor Management

You can only use the following applications if you are licensed for Subcontractor Management.

Configure Subcontractor Management Settings (SMMSETNG)

Use this new screen (**Projects » Subcontractor Management » Subcontractor Management Controls » Configure Subcontractor Management Settings**) to establish and maintain control parameters for subcontractor functions. You can also use this screen to determine whether to require approval of work assignments, configure the charging rules on work assignments, and validate security clearance requirements of the work assignment to the security clearance of the vendor employee.

Manage Work Assignment Roles (SMMWROLE)

Use this new application (**Projects » Subcontractor Management » Subcontractor Management Controls » Manage Work Assignment Roles**) to set up work assignment roles that will be used to approve timesheets and expenses for vendor employees in the Subcontractor Management module.

Manage Work Assignment Approval Codes (SMMSETA)

Use this new screen (**Projects » Subcontractor Management » Subcontractor Management Controls » Manage Work Assignment Approval Codes**) to set up work assignment approval codes that define the type of approval required for work assignments. Within this screen, you can also link the users who can approve work assignments at the top level or at the contract level.

Work Assignments

You can only use the following applications if you are licensed for Subcontractor Management.

Manage Work Assignments (SMMWRK)

Use this new screen (**Projects » Subcontractor Management » Work Assignments » Manage Work Assignments**) to enter and maintain work assignments for subcontractor management purchase orders (POs).

Work assignments contain the settings and business rules that define what items can be charged and who can charge against the subcontractor agreement POs in Time & Expense. Each work assignment can only contain one purchase order ID, but there can be many PO lines on one work assignment. PO lines can be duplicated within the same work assignment and/or across multiple work assignments. The work assignment defaults from values entered in the purchase order, including charging information (project, account, and organization) from the subcontractor agreement PO. The prime contractor can edit the charging information if the **Charge Code Change** check box is selected on the Configure Purchase Order Voucher Settings screen.

Approve Work Assignments (SMPWRKA)

Use this new application (**Projects » Subcontractor Management » Work Assignments » Approve Work Assignments**) to approve work assignments, charge lines, and vendor employee lines if approval is required as set up on the Configure Subcontractor Management Settings screen. Only users linked to an approval code set up in Manage Work Assignment Approval Codes can use this screen.

If approvals are not required, when the work assignment is saved, the approval status for the work assignment, charge lines, and vendor employee lines will be set to **Approved** and disabled.

Print Work Assignment Detail Report (SMRWRK)

Use this new screen (**Projects » Subcontractor Management » Subcontractor Management Reports/Inquiries » Print Work Assignment Detail Report**) to print a detailed report of work assignments for all or a range (including just one) of vendors, customers, purchase orders, work assignments, and/or work assignment start and end dates.

View Work Assignment Status (SMQWA)

Use this new inquiry application (**Projects » Subcontractor Management » Subcontractor Management Reports/Inquiries » View Work Assignment Status**) to view extensive information on work assignments without printing a report. You can view details of the purchase order and PO line linked to the work assignment, as well as information on the subcontractor invoice and voucher created for the work assignment. You can see how much has been invoiced, vouchered, and paid.

Subcontractor Invoices

You can only use the following applications if you are licensed for Subcontractor Management.

Create Subcontractor Invoices (SMPINVC)

The new Create Subcontractor Invoices application (**Projects » Subcontractor Management » Subcontractor Invoices » Create Subcontractor Invoices**) is now available. You can use this application to create subcontractor agreement invoices based on labor hours from Deltek Time & Expense and/or hourly rates of resources from the work assignments or PO line.

Transactions that are over the hours and amount, or are outside of the period of performance within the work assignment are flagged as “at risk” and moved to the unallowable account indicated in the work assignment.

Manage Subcontractor Invoices (SMMMINVC)

Use this new screen (**Projects » Subcontractor Management » Subcontractor Invoices » Manage Subcontractor Invoices**) to view the subcontractor invoices created using the Create Subcontractor Invoices application or make changes to existing subcontractor invoices that are not yet approved.

You can also use this screen to create new subcontractor invoices manually or via web services. For these invoices, Costpoint will not perform validation against previously invoiced amounts or the timesheet information in the staging tables. You must make sure that labor rates and hours for these invoices are correct and that invoice amounts are not being duplicated.

Approve Subcontractor Invoices (SMMAINVC)

Use this new application (**Projects » Subcontractor Management » Subcontractor Invoices » Approve Subcontractor Invoices**) to approve subcontractor invoices created using the Create Subcontractor Invoices application or entered on the Manage Subcontractor Invoices screen. Only subcontractor invoices that are pending approval and have the **Submit for Approval** check box selected in Manage Subcontractor Invoices display on this screen.

Various information about the subcontractor invoice is available on this screen to facilitate the approver's decision in approving. Most fields are display-only and cannot be edited. You can modify only the **Approved** check box (for both internal and subcontractor approvals), the subcontractor **Approver** field, and the **Default Receiving Info** group box (if there is no default packing slip or receipt ID specified for the invoice).

Print Subcontractor Invoices (SMRINVC)

Use this new screen (**Projects » Subcontractor Management » Subcontractor Invoices » Print Subcontractor Invoices**) to print subcontractor invoices created using the Create Subcontractor Invoices screen as well as invoices entered or updated on the Manage Subcontractor Invoices screen. You can print approved and unapproved invoices. You can limit which invoices are printed by accounting period, vendor, purchase order, invoice number, and invoice control number. You also have options to include charging and detail information in the invoices to be printed.

People Domain

This section includes summaries of changes made in relation with the Subcontractor Management feature within the Costpoint People domain.

Subcontractor Management Updates for Costpoint to Time & Expense Integration

To support the Subcontractor Management feature in the transfer of employee data from Costpoint to Time & Expense, the following updates were applied to Costpoint screens.

Configure Labor Settings (LDMLABOR)

This screen contains the following new fields:

- **Separate System for Employees and Subcontractors** — Select this check box to indicate if subcontractors are handled in a separate Deltek Time & Expense system. This check box is available only if you are licensed for Subcontractor Management.
- **Subcontractor Version** — If you handle subcontractors in a different system, select the version of Time & Expense for the subcontractor system from this drop-down list. This drop-down list is available only if the **Separate System for Employees and Subcontractors** check box is selected.

Export Data to Deltek Time and Expense (LDPDTC)

The Export Information tab contains the following new fields which are available when you have a Subcontractor Management license and if you selected the **Separate System for Employees and Subcontractors** check box on the Corporate Labor Settings subtask of the Configure Labor Settings screen.

- **Export Employee Data** — Select this option to export employee data to the Deltek Time & Expense domain which holds employee data. Subcontractor data will not be exported if you select this option.
- **Export Subcontractor Data** — Select this option to export subcontractor data to the Deltek Time & Expense domain which holds subcontractor data. Employee data will not be exported if you select this option.
- **Subcontractor File Location** — If you are handling subcontract resources in a separate Deltek Time & Expense system, enter, or use Lookup to select, the alternate file location where you want to store subcontractor data.

The Resource Information tab includes the following updates:

- A new **Subcontractors** group box contains the following fields which you can use to specify the subcontractor data that you want to include in the export process:
  - **Subcontractors** — Select this check box if subcontractors should be included in the resource EMPL file export.

    This check box is available if you are licensed for Subcontractor Management. In addition, this check box is available if you select the **Separate System for Employees and Subcontractors** check box on the Corporate Labor Settings subtask of the Configure Labor Settings screen, and if the **Export Type** is **Export Subcontractor Data** on the Export Information tab.

- **Subcontractors History** — Select this check box if subcontractors should be included in the resource EMPL_HISTORY file export. This check box is available only if you select the **Subcontractors** check box.
- **Default Labor Location (UDT03)** — Select this check box to include, in the EMPL_HISTORY_YYYYMMDDHHMMSS.CSV file, the subcontractor's default Labor Location (VE_LAB_INFO.lab_loc_cd) from the Labor Information and History subtask on the Manage Vendor Employees screen. This check box is available when you select both the **Subcontractor History** check box and the **Base Tables-Labor Location (UDT03)** check box on the Base/Link Tables subtask.
- **Default PLC (UDT07)** — Select this check box to include, in the EMPL_HISTORY_YYYYMMDDHHMMSS.CSV file, the subcontractor's default PLC (VE_LAB_INFO.df_bill_lab_cat_cd) from the Labor Information and History subtask on the Manage Vendors Employees screen.
- **Default Pay Type (UDT10)** — Select this check box to include, in the EMPL_HISTORY_YYYYMMDDHHMMSS.CSV file, the subcontractor's default Pay Type (VE_LAB_INFO.dflt_pay_type) from the Labor Information and History subtask on the Manage Vendors Employees screen.

- A new **Subcontractor Groups** group box contains the following fields which you can use for grouping subcontractors by vendor, manager, or company and to include them in the EMPL_GROUP file export.
  - **Vendor Groups** — Select this check box to group subcontractors by vendor and to include subcontractors in the resource EMPL_GROUP file export.
  - **Manager Groups** — Select this check box to group subcontractors by Manager and to include subcontractors in the resource EMPL_GROUP file export.
  - **Company Groups** — Select this check box to group subcontractors by Company and to include the subcontractors in the resource EMPL_GROUP file export.

Materials Domain

This section includes summaries of changes made in relation with the Subcontractor Management feature within the Costpoint Materials domain.

Procurement Changes to Support Subcontractor Purchase Agreements

Manage Statement of Work Types (POMSOWTP)

Use this new screen (**Materials » Purchasing » Purchasing Code » Manage Statement of Work Types**) to define the different types of statement of work (SOW), which you can use when creating a SOW and different types of SOW templates. This new screen uses the SOW_TYPE table.

Manage Statement of Work (POMSOW)

Use this new screen (**Materials » Purchasing » Statement of Work » Manage Statement of Work**) to define the SOW, specify attributes, and revise SOWs. Deletion of a SOW record is not allowed if the record is used in request for quotes (RFQ), quotes, requisitions, and purchase order (PO).

The SOW is unique by company, and Lookup and Query functions only retrieve SOWs with a company ID authorized for the user. This new screen uses the SOW table.

Manage Buyers (POMBUY)

The **PO Entry Authorization** group box now has new PO type check boxes for **Subcontractor Agreement, Subcontractor Agreement Blanket,** and **Subcontractor Agreement Release**.

Costpoint allows/disallows buyers to enter new PO types depending on option selection.

The group boxes on this screen have been reorganized as well to fit new options.

Manage Purchase Orders (POMMAIN)

These are the changes to this screen:

- Three new PO types have been added:
  - Subcontractor Agreement
  - Subcontractor Agreement Blanket
  - Subcontractor Agreement Release

  These have been added as well to the Lookup. The Lookup in the **Buyer** field filters out buyers who are not authorized to enter the selected PO type.
- The PO type **Subcontract PO** was renamed to **Subcontract Retainage PO**.
- The **Period of Performance** (Start and End Date) was moved from the **Blanket Info** tab to the **Other Defaults** tab.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for that PO line. This check box is always disabled. The system will mark this box as selected if you enter one or more rows on the Resources subtask for the PO line.

- **Security Requirements tab (in form view)** — Use this tab to specify the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type.
- The **Create Release** button has been renamed to **Create Blanket PO Release**.
- **PO_LN_RESOURCE** — This is a new table for this application.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to add one or more SOWs to the PO at the header level. This applies to all PO types. Multiple SOWs that have the same SOW ID but with different revisions are not allowed at either the header or line levels.
- **Link SCI/SAP Security Codes (header level)** — Use this subtask to specify the default security requirements of any resources that are used for that PO. This applies only to subcontractor type of orders and is disabled if the PO is changed to any other type.
- **Line SOW** — Use this subtask to add one or more statements of work to the PO at the line level. This applies to all PO types.
- **Resources** — Use this subtask to specify one or more resources associated with a PO line. This applies only to the Subcontractor Agreement type of orders, and information will be cleared and fields are disabled if the PO is changed to any other type.
  - **Vendor Employees** — Use this subtask to specify one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes (line level)** — Use this subtask to specify the default security requirements of any resources that are used for that PO. This applies only to subcontractor type of orders and is disabled if the PO is changed to any other type.

Expedite Purchase Orders (POMEXPD)

These are the changes to this screen:

- New check boxes in the **Select PO Type** group box for the new PO types:
  - Subcontractor Agreement
  - Subcontractor Agreement Blanket
  - Subcontractor Agreement Release

  The new PO types have these inherent characteristics:
  - If the option is selected, the Execute function will also load purchase orders of this PO type.
  - If the option is not selected, the Execute function will exclude purchase orders of this PO type.
- The PO type label **Subcontract PO** has been renamed to **Subcontract Retainage PO**.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for a line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the PO line.
- **Security Requirements tab (in form view)** — Use this tab to specify the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type. Once you have created the new release,

you can modify the editable fields, which specifically applies to the Subcontractor Agreement release. The values in the original blanket will remain unchanged.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the new release, which initially defaults in SOWs from the blanket header, but you can add or remove as necessary.
- **Line SOW** — This subtask applies specifically to the PO line on the new release. The field values default from the corresponding blanket line.
- **Resources** — This subtask applies specifically to the PO line on the new release. The field values default from the corresponding blanket line.
  - **Vendor Employees** — This subtask displays one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes** — This subtask displays the security clearance code.

Approve Pending Purchase Orders (POMSTAT)

These are the changes to this screen:

- New options to the Query screen for the new PO types of Subcontractor Agreement, Subcontractor Agreement Blanket, and Subcontractor Agreement Release.
- The PO type label **Subcontract PO** has been renamed to **Subcontract Retainage PO**.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for a line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the PO line.
- **Security Requirements tab (in form view)** — This tab displays the security requirements of the resource.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the new release, which initially defaults in SOWs from the blanket header, but you can add or remove as necessary.
- **Line SOW** — This subtask applies specifically to the PO line on the new release. The field values default from the corresponding blanket line.
- **Resources** — This subtask applies specifically to the PO line on the new release. The field values default from the corresponding blanket line.
  - **Vendor Employees** — This subtask displays the vendor employee against a particular resource.
- **Link SCI/SAP Security Codes** — This subtask displays the security clearance code of the resource.

Create Blanket Purchase Order Releases (POMRELS)

These are the changes to this screen:

- You can now create a release against a Subcontractor Agreement Blanket order. These releases will be of PO type = Subcontractor Agreement Release. The created releases have PO_HDR.S_PO_TYPE="L."
- The Query screen now includes PO type of Subcontractor Agreement Blanket when retrieving Blanket POs based on the specified criteria.

- **PO Type** — Use this field to indicate the type of blanket order that is retrieved in order to distinguish between a regular Blanket Order and a Subcontractor Agreement Blanket Order. Costpoint also now loads the new PO line fields from the blanket. Once the new release is created, you can modify the editable fields.
- **Security Requirements tab (in form view)** — Use this tab to specify the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type. Once you have created the new release, you can modify the editable fields, which specifically applies to the Subcontractor Agreement release. The values in the original blanket will remain unchanged.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to add one or more SOWs to the PO at the header level. This applies to all PO types. Multiple SOWs that have the same SOW ID but with different revisions are not allowed at either the header or line levels.
- **Link SCI/SAP Security Codes (header level)** — Use this subtask to specify the default security requirements of any resources that are used for that PO. This applies only to subcontractor type of orders and is disabled if the PO is changed to any other type.
- **Line SOW** — Use this subtask to add one or more statements of work to the PO at the line level. This applies to all PO types.
- **Resources** — Use this subtask to specify one or more resources associated with a PO line. This applies only to the Subcontractor Agreement type of orders, and information will be cleared and fields are disabled if the PO is changed to any other type. The information will be saved in the PO_LN_RESOURCE table for the newly created release order line. Any resources associated with the original Subcontractor Agreement Blanket line will remain unchanged.
- **Link SCI/SAP Security Codes (line level)** — Use this subtask to specify the default security requirements of any resources that are used for that PO. This applies only to subcontractor type of orders and is disabled if the PO is changed to any other type.

Create Purchase Order Change Orders (POMCHNG)

These are the changes to this screen:

- You can now create change orders for the following PO types:
  - Subcontractor Agreement
  - Subcontractor Agreement Blanket
  - Subcontractor Agreement Release PO types

  If a change order is created for any of the new PO types, and **Save Existing Change Order to History File** is selected, the application creates new records in the history tables.
- The Query screen now includes the PO type options **Subcontractor Agreement, Subcontractor Agreement Blanket,** and **Subcontractor Agreement Release**.
- **Subcontract PO** has been renamed to **Subcontract Retainage PO**.
- **PO_LN_RSRCE_CHNG** — This is a new table for this application.

Compute/Print Purchasing Commitments (POPCOMM)

This application now excludes PO lines from purchase orders with PO type of Subcontractor Agreement Blanket for all commitment amounts, except the Unreleased Blanket commitments (selected).

If the screen option to include **Unreleased Blanket Line Amts** is selected, Costpoint includes Subcontractor Agreement Blanket PO lines (similar to regular blanket PO lines).

The computation logic should still include purchase orders with PO type of Subcontractor Agreement or Subcontractor Agreement Release.

View Item Purchasing Information (POQITEM)

These are the changes to this screen:

- The Lookup now includes PO types of Subcontractor Agreement, Subcontractor Agreement Blanket, and Subcontractor Agreement Release.
- The PO type label **Subcontract PO** has been renamed to **Subcontract Retainage PO**.
- **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for a line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the line.
- **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type.

The following new subtasks are added to this application:

- **Quotes** — This subtask displays the quotes corresponding to the header selection criteria. The Quotes subtask has the following subtasks:
  - **Header SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Line SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Resources** — This subtask displays the details regarding the resources of the subcontractor.
  - **Link SCI/SAP Security Codes** — This subtask displays the security clearance code.

  These are the changes to this subtask:

  - **Security Requirements tab (in form view)** — This tab displays the security requirements of the resource.
  - **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for a line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the line.
- **RFQs** – This subtask has the following new subtasks:
  - **Header SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Line SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Resources** — This subtask displays the details regarding the resources of the subcontractor.
  - **Link SCI/SAP Security Codes** — This subtask displays the security clearance code.

- The RFQs subtask has a Security Requirements tab. This tab specifies the security requirements of the resource.

  Other changes to this subtask:

  - **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for a line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the line.

- **Requisitions** — This subtask has the following new subtasks:
  - **Header SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Line SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Resources** — This subtask displays the details regarding the resources of the subcontractor.
  - **Link SCI/SAP Security Codes** — This subtask displays the security clearance code.

  These are the changes to this subtask:

  - **Security Requirements tab (in form view)** — This tab displays the security requirements of the resource.
  - **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for a line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the line.
  - **Subcontractor Agreement** — This check box indicates that the requisition is for subcontractor agreement.

- **PO History** — This subtask has the following new subtasks:
  - **Header SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Line SOW** — This subtask displays the SOW or multiple SOWs for the PO.
  - **Resources** — This subtask displays the details regarding the resources of the subcontractor.
  - **Link SCI/SAP Security Codes** — This subtask displays the security clearance code.

  These are the changes to this subtask:

  - **Security Requirements tab (in form view)** — This tab displays the security requirements of the resource.
  - **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for a line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the line.

- **Header SOW** — This subtask displays the SOW or multiple SOWs for the PO.
- **Line SOW** — This displays the SOW or multiple SOWs for the purchase order.
- **Resources** — This displays the details regarding the resources of the subcontractor.
- **Link SCI/SAP Security Codes** — This displays the security clearance code.
- **Work Assignments** — This subtask displays all work assignments associated with the selected PO/Rlse/PO line.

View Purchase Order Change Orders (POQCHNG)

These are the changes to this screen:

- The PO **Type** now displays description instead of code.

The following new subtasks are added to this application:

- **Header SOW (header level)** — This subtask displays the SOW or multiple SOWs for the PO.
- **Header SOW (line level)** — This subtask displays the SOW or multiple SOWs for the PO.

View Purchase Order Status (POQSTAT)

These are the changes to this screen:

- New check boxes in the **Select PO Type** group box for the new PO types:
  - Subcontractor Agreement
  - Subcontractor Agreement Blanket
  - Subcontractor Agreement Release

  The new PO types have these inherent characteristics:

  - If the option is selected, the Execute function also loads purchase orders of this PO type.
  - If the option is not selected, the Execute function excludes purchase orders of this PO type.
- The PO type label **Subcontract PO** has been renamed to **Subcontract Retainage PO**.
- The existing fields and group boxes have been reorganized for new options.
- **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to display the SOW for the new release, which initially defaults in SOWs from the blanket header.
- **Link SCI/SAP Security Codes** — Use this subtask to display the security clearance code.

The Purchase Order Lines subtask has a new subtask, Work Assignments, which displays all work assignments associated with the selected PO/Rlse/PO line.

Configure Purchase Order Print Options (POMPOPTS)

These are the changes to this screen:

- **Statement of Work** — Select this check box to print the header and line SOW for subcontractor agreements.
- **Statement of Work Location** — Select this check box to print the location of header and line SOW for subcontractor agreements.
- **Statement of Work Notes** — Select this check box to print the notes of header and line SOW for subcontractor agreements.

- **Subcontractor Agreement** group box — Use this group box to print the resources, work location, hours, vendor employees, hourly rate, and security requirements.
  - **Resources** — Select this check box to print subcontractor agreement resource information.
  - **Hours** — Select this check box to print the total hours for the subcontractor agreement resource.
  - **Hourly Rate** — Select this check box to print the hourly labor rate of the subcontractor agreement resource.
  - **Work Location** — Select this check box to print the hourly labor rate for the subcontractor agreement resource.
  - **Vendor Employees** — Select this check box to print the vendor employees associated with the subcontractor agreement resource.
  - **Security Requirements** — Select this check box to print the security requirements for the subcontractor agreement resource.
- The **Std Text Placement** group box has been renamed to **Hdr Text/Doc/SOW Placement** to be consistent with a similar change made in the Print Purchase Orders application, to where this defaults.
- The **Header Notes Placement** group box has been renamed to **Hdr Notes Placement** to be consistent with other changes.

  The printing options have the following conditions:
  - The Statement of Work Location and Statement of Work Notes options will only be available if the **Statement of Work** option is selected. Otherwise, they will be cleared and disabled.
  - The **Hours**, **Hourly Rate**, **Work Location**, and **Vendor Employee** options will only be available if the **Resources** option is selected. Otherwise, they will be cleared and disabled.
  - If an option is selected, then that information will print on the report.
  - If an option is not selected, then that information will not print on the report.

Print Purchase Orders (PORPPO)

These are the changes to this screen:

- The existing fields and group boxes have been reorganized for new options.
- **PO Type** — Use this group box to select the type of PO to print.
  - **Purchase Order** — Select this check box to print the regular PO.
  - **Blanket Order** — Select this check box to print the blanket order.
  - **Release Order** — Select this check box to print the release order.
  - **Subcontract Retainage PO** — Select this check box to print the subcontract retainage PO.
  - **GFM/GFE Order** — Select this check box to print the GFM/GFE order.
  - **Subcontractor Agreement** — Select this check box to print the subcontractor agreement.
  - **Subcontractor Agreement Blanket** — Select this check box to print the subcontractor agreement Blanket.

- **Subcontractor Agreement Release** — Select this check box to print the subcontractor agreement release.

  The report will only include the PO type that has been selected.

- This screen now prints SOW (header or line), security requirements, resource, and other related information depending on the options selected on the Configure PO Print Options screen.
- The **Subcontract Purchase Orders** check box was renamed to **Subcontract Retainage PO**.
- The **Std Text Placement** group box was renamed to **Hdr Text/Doc/SOW Placement**. Depending on selection (Top or Bottom), the header SOW prints before or after line information.

Print Purchase Order Change Orders (PORPCO)

These are the changes to the header:

- The application now prints the SOW information if there is a difference in the header level SOW ID/Revision between the two change orders that are being compared. The following are the condition of the changes:
  - **Deletion of existing SOWs** — If an existing SOW/Rev combination is deleted (that is, it exists in the old change order but not in the new change order), add logic in the report to include a “DELETED:” section showing the deleted SOWs. The information for SOW should include SOW ID/Rev, Description, Notes, and Location.
  - **Addition of new SOWs** — If a new SOW/Rev combination is added (that is, it did not exist in the old change order but is in the new change order), add logic in the report to include an “INSERTED:” section showing the newly added SOWs. The information for SOW should include SOW ID/Rev, Description, Notes, and Location.
  - **Change to an existing SOW** — If the revision on a SOW/Rev combination associated with a PO is changed, it is equivalent to deleting the old SOW/Rev combination and inserting the new SOW/Rev combination. See the first and second bullet items above.

These are the changes to the line:

- The application now prints the SOW information if there is a difference in the line level SOW ID/Revision between the two change orders that are being compared. The following are the condition of the changes:
  - **SOW change (existing PO line)** — A change to a SOW for the line could be a revision change for an existing SOW, or addition of a new SOW, or deletion of an existing SOW. In each case, the report will include the “FROM:” section showing all the SOWs for the older change order, and a “TO:” section showing the SOWs for the new change order. As part of the FROM and TO sections, print basic information for that particular line, per existing logic. The information for SOW should include SOW ID/Rev, Description, Notes, and Location.

    If a PO line is included in the report due to change in some other field, and there is no change SOW between the two change orders being compared, do not print SOW information.

  - **Deletion of existing PO line** — Per existing logic, the report prints basic PO line information with a “DELETED:” indicator. In this case, also print the SOW information for the line, in order to give visibility into what work is being deleted.

   - **Addition of new PO line** — Per existing logic, the report prints basic PO line information with an “INSERTED:” indicator. In this case, also print the SOW information for the line, in order to give visibility into what work is being added.
- The **Standard Text Placement** and **Header Notes Placement** options have been changed from drop-down list to radio buttons (Top, Bottom) and renamed to **Hdr Text/Doc/SOW Placement** and **Hdr Notes Placement**, respectively. Header SOW will print before or after line info, similar to existing placement logic for header standard text and documents.
- The application now suppresses SOW info labels and values if the option to print SOW is not selected in Configure PO Print Options. If Print SOW is selected, but Print SOW Notes or SOW Location is not selected, the cleared fields are disabled.

Print Purchase Order Register Report (PORREG)

These are the changes to this screen:

- **PO Type** — Use this group box to select the type of PO to print.
   - **Subcontractor Agreement** — Select this check box to print the subcontractor agreement.
   - **Subcontractor Agreement Blanket** — Select this check box to print the subcontractor agreement Blanket.
   - **Subcontractor Agreement Release** — Select this check box to print the subcontractor agreement release.
- The PO type **Subcontract PO** was renamed to **Subcontract Retainage PO**.
- The existing fields were also reorganized to make room for the new options.

Print Purchase Order Expediting Report (POREXPD)

These are the changes to this screen:

- **Include PO Types** — Use the new check boxes in this group box to select the PO types to include in the report.
   - **Subcontractor Agreement** — Select this check box to include this PO type in the report.
   - **Subcontractor Agreement Release** — Select this check box to include this PO type in the report.
- The PO type **Subcontract PO** was renamed to **Subcontract Retainage PO**.
- **Standard POs** was renamed to **Purchase Order**.
- **Blanket PO Releases** was renamed to **Release Order**.
- The existing fields were also reorganized to make room for the new options.
- The report will only include the PO types that have been selected.

Reconcile Purchase Orders (POPRECON)

These are the changes to this screen:

- **PO Types** — Use the new options in the drop-down list to select the PO type to reconcile.

- **Subcontractor Agreement POs and Releases** — Select this option to reconcile subcontractor agreement POs and releases.
- **Subcontractor Agreement Blanket POs** — Select this option to reconcile subcontractor agreement blanket POs.
- **GFM/GFE Orders** — Select this option to reconcile GFM/GFE orders. If you selected this option, **Reconcile Vouchered and GL Posted Amounts** is not applicable.

- The PO type **Subcontract PO** was renamed to **Subcontract Retainage PO**.
- This application now includes PO types of Subcontractor Agreement, Subcontractor Agreement Blanket, Subcontractor Agreement Release, and GFM/GFE Orders, if the corresponding PO type option is selected.

Archive Purchase Orders (POPARCH)

These are the changes to this screen:

- **Select PO Types to Archive** — Use the new check boxes in the group box to select which PO types to archive.
  - **PO Header Statement of Work** — Select this check box to archive PO header statement of work.
  - **PO Line Statement of Work** — Select this check box to archive PO line statement of work.
  - **PO Line Resources** — Select this check box to archive PO line resources.
  - **PO Line Resource Vendor Employees** — Select this check box to archive PO line resource vendor employees.

    If you selected any of the new options, copy the information from the active table to the corresponding history table.
- **PO_LN_RESOURCE_HS** — This is a new table for this application.

Update Subcontract Retainage PO Status (POMSCST)

These are the changes to this screen:

- The application Update Subcontract PO Status has been changed to Update Subcontract Retainage PO Status to be consistent with the change in PO type nomenclature.
- The application name has also been modified in the Menu listing.
- **Subcontract PO** was renamed to **Subcontract Retainage PO**.

Manage Purchase Requisitions (PPMNTRQ1)

These are the changes to the requisition header:

- **Subcontractor Agreement** — Select this check box to indicate that the requisition is for creating subcontractor agreements. If this is selected, requisition lines can only be generated into PO of type Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release.

  For requisitions specified as a Subcontractor Agreement, the Suggested Blanket PO must have a PO type of Subcontractor Agreement Blanket.

  The selected buyer must be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. The Lookup in the **Buyer** field will filter out those who are not authorized to enter at least one of these PO types.

The Subcontractor Agreement option has also been added to the Query screen at the requisition header level so that users can filter for rows of this type.

- **Security Requirements tab (in form view/header level)** — Use this tab to specify the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type.
- **RQ_LN_RESOURCE** — This is a new table for this application.

These are the changes to the requisition line:

- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for a requisition. This check box is always disabled. The system will mark this box as selected if you enter one or more rows on the Resources subtask for the requisition line.
- **Line** has been renamed to **Req Line**.
- **Security Requirements tab (in form view/line level)** — Use this tab to specify the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to add one or more SOWs to the requisition at the header level. Multiple SOWs that have the same SOW ID but with different revisions are not allowed at either the header or line levels.
- **Link SCI/SAP Security Codes (header level)** — Use this subtask to specify the default security requirements of any resources that are used for the requisition. This applies only to subcontractor type of orders and is disabled if changed to any other type.
- **Line SOW** — Use this subtask to add one or more SOWs to the requisition at the line level.
- **Resources** — Use this subtask to specify one or more resources associated with a requisition line. This applies only to the Subcontractor Agreement type of orders, and information will be cleared and fields are disabled if the PO is changed to any other type.
    - **Vendor Employees** — Use this subtask to specify one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes (line level)** — Use this subtask to specify the default security requirements of any resources that are used for the requisition. This applies only to subcontractor type of orders and is disabled if changed to any other type.

Approve Purchase Requisitions (PPMRQAPX)

These are the changes to the requisition header:

- **Subcontractor Agreement** — Select this check box to indicate that the requisition is for creating subcontractor agreements. If this is selected, requisition lines can only be generated into a PO of type Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. This option has also been added to the Query screen at the requisition header level so that you can filter for rows of this type.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system

will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.

- **Security Requirements tab (in form view/line level)** — Use this tab to specify the default security requirements of any resources that are used for the PO. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if the PO is changed to any other type.

The following new subtasks are added to this application:

- **Header SOW** — This subtask displays the SOW for the new release, and values default from the SOWs of the blanket header.
- **Link SCI/SAP Security Codes (header level)** — This subtask displays the security clearance code.
- **Line SOW** — This subtask displays the SOW on the line level. This subtask applies specifically to the requisition line on the new release. The field values default from the corresponding blanket line.
- **Resources** — This subtask displays the details of the resources of the subcontractor. The field values default from the corresponding blanket line.
  - **Vendor Employees** — This subtask displays one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes (line level)** — This subtask displays the security clearance code.

Approve Purchase Requisition Lines (PPMRQAPL)

These are the changes to the requisition header:

- **Subcontractor Agreement** — Select this check box to indicate that the requisition is for creating subcontractor agreements. If this is selected, requisition lines can only be generated into a PO of type Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. This option has also been added to the Query screen at the requisition header level so that you can filter for rows of this type.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.
- **Security Requirements tab (in form view)** – This tab displays the default security requirements of any resources that are used for the requisition. The values default from the requisition header.

The following new subtasks are added to this application:

- **Header SOW** — This subtask displays the SOW for the new release. Values display as saved in the requisition line.
- **Link SCI/SAP Security Codes (header level)** — This subtask displays the security clearance code.
- **Line SOW** — This subtask displays the SOW on the line level. This subtask applies specifically to the requisition line on the new release. Values display as saved in the requisition line.
- **Resources** — This subtask displays the details of the resources of the subcontractor. Values display as saved in the requisition line.

- **Vendor Employees** — This subtask displays one or more vendor employees against a particular resource. Values display as saved in the requisition line.
- **Link SCI/SAP Security Codes (line level)** — This subtask displays the security clearance code. Values display as saved in the requisition line.

Assign Purchase Requisitions to Buyers (PPMBUYAS)

These are the changes to this screen:

- **Subcontractor Agreement** — This check box indicates that the requisition is for creating subcontractor agreements. This is a display-only check box for this screen. This option has also been added to the Query screen at the requisition header level so that you can filter for rows of this type.
- The existing fields and group boxes have been reorganized for new options.

The following new subtasks are added to this application:

- **Header SOW** — This subtask displays the SOW the new release. Values display as saved in the requisition line.

Assign Purchase Requisition Lines to Buyers (PPMBUYAL)

These are the changes to this screen:

- **Subcontractor Agreement** — This check box indicates that the requisition is for creating subcontractor agreements. If this is selected, requisition lines can only be generated into a PO of type Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. This option has also been added to the Query screen at the requisition header level so that you can filter for rows of this type. This check box is non-editable from this screen.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.
- **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the requisition. The values default from the requisition header.
- The existing fields and group boxes have been reorganized for new options.

The following new subtasks are added to this application:

- **Header SOW** — This subtask displays the SOW for the new release. Values display as saved in the requisition line.
- **Line SOW** — This subtask displays the SOW on the line level. This subtask applies specifically to the requisition line on the new release. Values display as saved in the requisition line.
- **Link SCI/SAP Security Codes** — This subtask displays the security clearance code. Values display as saved in the requisition line.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

These are the changes to this screen:

- **Subcontractor Agreement** — Select this check box on the requisition header to indicate that the requisition is for creating subcontractor agreements. If this is selected, the default

PO/Release to assign (if not new) must have a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release.

The selected buyer must be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. The Lookup in the **Buyer** field will filter out those who are not authorized to enter at least one of these PO types.

The Query screen also now includes the PO type options Subcontractor Agreement, Subcontractor Agreement Blanket, and Subcontractor Agreement Release.

- **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.
- **RQ_LN_PO_RSRCE** — This is a new table for this application.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to add one or more SOWs to the requisition at the header level. Multiple SOWs that have the same SOW ID but with different revisions are not allowed at either the header or line levels.
- **Link SCI/SAP Security Codes (header level)** — Use this subtask to specify the default security requirements of any resources that are used for the requisition. This applies only to subcontractor type of orders and is disabled if changed to any other type.
- **Assign PO** — This subtask has the following new subtasks:
  - **Link SCI/SAP Security Codes** — Use this subtask to specify the default security requirements of any resources that are used for the requisition. This applies only to subcontractor type of orders and is disabled if changed to any other type.
  - **Resources** — Use this subtask to specify one or more resources associated with a requisition line. This applies only to the Subcontractor Agreement type of orders, and information will be cleared and fields are disabled if the PO is changed to any other type.
    - **Vendor Employees** — Use this subtask to specify one or more vendor employees against a particular resource.
- **Assign PO** – These are the other changes to this subtask:
  - The alternate part numbers have been moved to a new tab, **Alternate Parts** tab.
  - The existing fields and group boxes have been reorganized for new options.
  - **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.
  - **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.

  The Assign PO subtask was modified for the following functions:

  - Default in the corresponding new PO Type into the assign PO line.
  - Include three new PO types. These are Subcontractor Agreement, Subcontractor Agreement Blanket, and Subcontractor Agreement Release.

- Require the buyer on the requisition line to be authorized to create Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release PO type.
- Allow the new subcontractor agreement types of POs to be assigned to a requisition line.
- Apply defaulting of Suggested Blanket PO from the requisition line also to the new types of Subcontractor Agreement Blanket POs.
- If the negotiated currency for the Assign PO row is different from the transactional currency for the requisition, the hourly rate of the Resources defined for the generated PO line will be in terms of the negotiated currency, which will be the transactional currency on the generated PO.

The PO generation process observes the following conditions:

- If a new Subcontractor Agreement PO/Release is assigned to a requisition line, the PO generation process will create a new Subcontractor Agreement type of PO.
- If a new Subcontractor Agreement Blanket PO/Release is assigned to a requisition line, the PO generation process will create a new Subcontractor Agreement Blanket type of PO.
- If an existing Subcontractor Agreement PO/Release is assigned to a requisition line, the PO generation process will add a new line to the existing Subcontractor Agreement PO.
- If an existing Subcontractor Agreement Release PO/Release is assigned to a requisition line, the PO generation process will add a new line to the existing Subcontractor Agreement Release PO.
- If an existing Subcontractor Agreement Blanket PO ID is assigned to a requisition line, the PO generation process will add a new Subcontractor Agreement Release type of PO.

Apply PO Info to Purchase Requisitions by Line (PPMRQLN)

These are the changes to this screen:

- **Subcontractor Agreement** — This check box on the requisition header indicates that the requisition is for creating subcontractor agreements. If this is selected, the default PO/Release to assign (if not new) must have a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release.

  The selected buyer must be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. The Lookup in the **Buyer** field will filter out those who are not authorized to enter at least one of these PO types.

  The Query screen also now includes the PO type options **Subcontractor Agreement, Subcontractor Agreement Blanket**, and **Subcontractor Agreement Release**.
- **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.
- **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.

- **Line** has been renamed to **Req Line**.

The following new subtasks are added to this application:

- **Assign PO** — This subtask has the following new subtasks:
  - **Link SCI/SAP Security Codes** — Use this subtask to specify the default security requirements of any resources that are used for the requisition. This applies only to subcontractor type of orders and is disabled if changed to any other type.
  - **Resources** — Use this subtask to specify one or more resources associated with a requisition line. This applies only to the Subcontractor Agreement type of orders, and information will be cleared and fields are disabled if PO is changed to any other type.
    - **Vendor Employees** — Use this subtask to specify one or more vendor employees against a particular resource.
- **Assign PO** – These are the other changes to this subtask:
  - **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.

  The Assign PO subtask was modified for the following functions:

  - Default in the corresponding new PO Type into the assign PO line.
  - Include three new PO types. These are Subcontractor Agreement, Subcontractor Agreement Blanket, and Subcontractor Agreement Release.
  - Require the buyer on the requisition line to be authorized to create Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release PO type.
  - Allow the new subcontractor agreement types of POs to be assigned to a requisition line.
  - Apply defaulting of Suggested Blanket PO from the requisition line also to the new types of Subcontractor Agreement Blanket POs.
  - If the negotiated currency for the Assign PO row is different from the transactional currency for the requisition, the hourly rate of the Resources defined for the generated PO line will be in terms of the negotiated currency, which will be the transactional currency on the generated PO.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the new release, which initially defaults in SOWs from the blanket header.
- **Line SOW** — This subtask applies specifically to the PO line on the new release. It will initially default to SOWs from the corresponding blanket line, but you can add one or more statements of work at the line level.
- **Resources** — This subtask applies specifically to the PO line on the new release. It will initially default in Resources from the corresponding blanket line, but users can add or remove as necessary.
  - **Vendor Employees** — Use this subtask to specify one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code.

- The PO generation process observes the following conditions:
  - If a new Subcontractor Agreement PO/Release is assigned to a requisition line, the PO generation process will create a new Subcontractor Agreement type of PO.
  - If a new Subcontractor Agreement Blanket PO/Release is assigned to a requisition line, the PO generation process will create a new Subcontractor Agreement Blanket type of PO.
  - If an existing Subcontractor Agreement PO/Release is assigned to a requisition line, the PO generation process will add a new line to the existing Subcontractor Agreement PO.
  - If an existing Subcontractor Agreement Release PO/Release is assigned to a requisition line, the PO generation process will add a new line to the existing Subcontractor Agreement Release PO.
  - If an existing Subcontractor Agreement Blanket PO ID is assigned to a requisition line, the PO generation process will add a new Subcontractor Agreement Release type of PO.

Create Purchase Orders (PPPGPO)

The Create Purchase Orders screen can now create new PO subtasks for Subcontractor Agreement.

View Purchase Requisition Status (PPQRQSTS)

These are the changes to this screen:

- **Subcontractor Agreement** — Select this check box to indicate that the request for quotes (RFQ) is for creating subcontractor agreements.
- **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.

The following new subtasks are added to this application:

- **Header SOW** — This subtask displays the relevant SOWs for the requisition.
- **Link SCI/SAP Security Codes (header level)** — This subtask displays the specific security clearance code.
- **Req Lines** — This subtask has the following new subtasks:
  - **Line SOW** — This subtask applies specifically to the requisition line on the new release. It will initially default to SOWs from the corresponding blanket line, but you can add one or more statements of work at the line level.
  - **Resources** — This subtask applies specifically to the requisition line on the new release. It will initially default in Resources from the corresponding blanket line, but users can add or remove as necessary.
    - **Vendor Employees** — This subtask displays one or more vendor employees against a particular resource.
  - **Link SCI/SAP Security Codes** — This subtask displays the specific security clearance code.
  - **Req Lines** — These are the other changes to this subtask:

- **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.
- **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.

- **PO Lines** — This subtask has the following new subtasks:
  - **Work Assignments** — This subtask displays all work assignments associated with the selected PO/Rlse/PO line.
  - **Link SCI/SAP Security Codes** — This subtask displays the specific security clearance code.
  - **Header SOW** — This subtask displays the relevant SOWs for the PO line.
  - **Line SOW** — This subtask displays the SOW on the line level. Values display as saved in the PO line.
  - **Resources** — This subtask displays one or more resources associated with a PO line. This subtask has the Vendor Employee subtask on it which displays the vendor employee against a particular resource.
- **PO Lines** — These are the other changes to this subtask:
  - **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the PO line.
  - **Security Requirements tab (in form view)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.

Configure Purchase Requisition Print Options (PPMRQOP)

These are the changes to this screen:

- The **Standard Text Placement** group box label was renamed to **Hdr Text/Doc/SOW Placement.**
- The **Header Notes Placement** group box label was renamed to **Hdr Notes Placement.**

Print Purchase Requisitions (PPRPRRQ)

The existing **Standard Text Placement** and **Header Notes Placement** options have been changed from drop-down list to radio buttons (Top, Bottom) and renamed to **Hdr Text/Doc/SOW Placement** and **Hdr Notes Placement**, respectively. Header SOW will print before or after line info, similar to existing placement logic for header standard text and documents.

Costpoint now prints Statement of Work (header/line), Statement of Work Location, and Statement of Work Notes. This applies for all requisitions, even if not specified as a Subcontractor Agreement. Also, Costpoint now prints the Security Requirements, Resource, and other related information, but this applies only to requisitions that have been specified as a Subcontractor Agreement.

Manage Request for Quotes by Vendor (PPMRFQV)

These are the changes to this screen:

- **Subcontractor Agreement** — Select this check box to indicate that the RFQ is for creating subcontractor agreements. If a requisition is specified in the header section as a subcontractor agreement, this check box defaults as selected, which automatically disables the check box; otherwise, select this check box to indicate that the RFQ is for creating subcontractor agreements.

  This option has been added to the Query screen in the RFQ header level to allow you to filter for rows of this type. If the RFQ is specified as subcontractor agreement, the Reqd Qty becomes optional.

  The **Buyer** has to be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. The Lookup in the **Buyer** field filters out those who are not authorized to enter at least one of these PO types.
- **Security Requirements tab (in form view/header level)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if the user enters one or more rows on the Resources subtask for the RFQ line.
- **Security Requirements tab (in form view/line level)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.
- The **Line** label has been renamed to **RFQ Line** in order to distinguish from Resource Line on the new Resources subtask.
- **RFQ_LN_RESOURCE** — This is a new table for this application.

The following new subtasks are added to this application:

- **Header SOW** — This subtask displays the relevant SOWs for the requisition.
- **Link SCI/SAP Security Codes (header level)** — This subtask displays the specific security clearance code.
- **Line SOW** — This subtask applies specifically to the requisition line on the new release. It will initially default to SOWs from the corresponding blanket line, but you can add one or more statements of work at the line level.
- **Resources** — This subtask applies specifically to the requisition line on the new release. It will initially default in Resources from the corresponding blanket line, but users can add or remove as necessary.
  - **Resource Breakpoint** — Use this subtask to specify one or more breakpoints against a particular resource. Initially, the system defaults to a value equal to the total hours, if you do not manually add rows.
  - **Vendor Employees** — This subtask displays one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes (line level)** — This subtask displays the specific security clearance code.

Manage Request for Quotes by Item (PPMRFQI)

These are the changes to this screen:

- **Subcontractor Agreement (header level)** — Select this check box to indicate that the requisition is for creating subcontractor agreements. If you entered a requisition in the header level specified as a subcontractor agreement, this check box is automatically selected and disabled. Any other request for quotes added in the requisition is automatically marked as subcontractor agreement.

  If the requisition is specified as a subcontractor agreement, the **Buyer** has to be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. This is true for both the screen filter section and the RFQ header and line.

  The Lookup in the **Buyer** field filters out those who are not authorized to enter at least one of these PO types.
- The Query screen in the client transaction window now includes the new **Subcontractor Agreement** option in the Query Conditions selection criteria.
- **Security Requirements tab (in form view/line level)** — This tab displays the default security requirements of any resources that are used for the requisition. This applies only to the Subcontractor Agreement type of orders, and information is cleared and fields are disabled if changed to any other type.
- The **Line** label has been renamed to **RFQ Line** in order to distinguish from Resource Line on the new Resources subtask.
- **Subcontractor Agreement (line level)** — Select this check box to indicate that the requisition is for creating subcontractor agreements. If you entered a requisition in the header level specified as a subcontractor agreement, this check box is automatically selected and disabled. Any other request for quotes added in the requisition is automatically marked as subcontractor agreement.
- **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the requisition at the header level. This could be generic information related to the requisition as a whole, with additional statements of work at the line level, or it could contain all the information for the requisition and requisition lines. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Line SOW** — Use this subtask to specify the detailed statement of work on the line level. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Resources** — Use this subtask to specify the details of the resources of the subcontractor. The field values default from the corresponding blanket line.
  - **Resource Breakpoints** — Use this subtask to specify one or more breakpoints against a particular resource. Initially, the system defaults to a value equal to the total hours, if you do not manually add rows.
  - **Vendor Employees** — Use this subtask to request one or more vendor employees against a particular resource.

- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code on the line level.

Print Request for Quotes (PPRPRRFQ)

These are the changes to this screen:

- The **Standard Text Placement** group box label was renamed to **Hdr Text/Doc/SOW Placement.**
- The **Header Notes Placement** group box label was renamed to **Hdr Notes Placement.**
- Costpoint now prints Statement of Work (header/line), Statement of Work Location, and Statement of Work Notes. This applies to all requisitions. Also, Costpoint now prints the Security Requirements, Resource, and other related information, but this applies only to requisitions that have been specified as a subcontractor agreement.

Manage Vendor Quotes by Vendor (PPMQTV)

These are the changes to this screen:

- **Subcontractor Agreement** — Select this check box to indicate that the requisition is for creating subcontractor agreements. If you entered a requisition in the header level specified as a Subcontractor Agreement, this check box is automatically selected and disabled. Any other request for quotes added in the requisition is automatically marked as Subcontractor Agreement.

  If the requisition is specified as a subcontractor agreement, the Buyer has to be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. This is true for both the screen filter section and the RFQ header and line.

  If the Quote is specified as a Subcontractor Agreement, the Minimum Qty (on Quote line) becomes optional.

  The Lookup in the **Buyer** field filters out those who are not authorized to enter at least one of these PO types.
- The Query screen in the client transaction window now includes the new **Subcontractor Agreement** option in the Query Conditions selection criteria.
- **Resource Exists (line level)** — Select this check box to indicate that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.
- **Security Requirements tab (form view/header level)** — This tab displays the default security requirements of any resources that are used for the line. This applies only to quotes specified as a subcontractor agreement and is cleared and disabled if the subcontractor agreement option has been cleared. This tab has the following inherent characteristics:
  - Initially, on a new line, this information defaults from the values in the header, if available. You can then edit as necessary.
  - Indicate whether the resource requires US citizenship or must be authorized for ITAR (International Traffic in Arms Regulations).
  - Specify the Security Clearance requirements for resources associated with the line.
  - All fields on this tab are non-editable if the requisition is not specified as a Subcontractor Agreement.

- **Security Requirements tab (form view/line level)** — This tab displays the default security requirements of any resources that are used for the quote. This applies only to quotes specified as a subcontractor agreement and is cleared and disabled if the subcontractor agreement option has been cleared. This tab has the following inherent characteristics:
  - Initially, on a new line, this information defaults from the values in the header, if available. You can then edit as necessary.
  - Indicate whether the resource requires US citizenship or must be authorized for ITAR (International Traffic in Arms Regulations).
  - Specify the Security Clearance requirements for resources associated with the line.
  - All fields on this tab are non-editable if the requisition is not specified as a Subcontractor Agreement.
  - **QT_LN_RESOURCE** — This is a new table for this application.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the requisition at the header level. This could be generic information related to the requisition as a whole, with additional statements of work at the line level, or it could contain all the information for the requisition and requisition lines. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code in the header level.
- **Line SOW** — Use this subtask to specify the detailed statement of work on the line level. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Resources** — Use this subtask to specify the details of the resources of the subcontractor. This applies only to quotes specified as a subcontractor agreement, and information is cleared if this option is not selected.
  - **Resource Breakpoints** — Use this subtask to specify one or more breakpoints against a particular resource. Initially, the system defaults to a value equal to the total hours, if you do not manually add rows.
  - **Vendor Employees** — Use this subtask to request one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code in the line level.

Manage Vendor Quotes by Item (PPMQTI)

These are the changes to this screen:

- **Subcontractor Agreement** — Select this check box to indicate that the requisition is for creating subcontractor agreements. If you entered a requisition in the header level specified as a subcontractor agreement, this check box is automatically selected and disabled. Any other request for quotes added in the requisition is automatically marked as subcontractor agreement.

  If the requisition is specified as a subcontractor agreement, the Buyer has to be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. This is true for both the screen filter section and the RFQ header and line.

If the Quote is specified as a Subcontractor Agreement, the Minimum Qty (on Quote line) becomes optional.

The Lookup in the **Buyer** field filters out those who are not authorized to enter at least one of these PO types.

- The Query screen in the client transaction window now includes the new **Subcontractor Agreement** option in the Query Conditions selection criteria.
- **Resource Exists** — Select this check box to indicate that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.
- **Security Requirements tab (form view)** — This tab displays the default security requirements of any resources that are used for the line. This applies only to quotes specified as a subcontractor agreement and is cleared and disabled if the subcontractor agreement option has been cleared. This tab has the following inherent characteristics:
  - Initially, on a new line, this information defaults from the values in the header, if available. You can then edit as necessary.
  - Indicate whether the resource requires US citizenship or must be authorized for ITAR (International Traffic in Arms Regulations).
  - Specify the Security Clearance requirements for resources associated with the line.
  - All fields on this tab are non-editable if the requisition is not specified as a Subcontractor Agreement.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the requisition at the header level. This could be generic information related to the requisition as a whole, with additional statements of work at the line level, or it could contain all the information for the requisition and requisition lines. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code in the header level.
- **Line SOW** — Use this subtask to specify the detailed statement of work on the line level. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Resources** — Use this subtask to specify the details of the resources of the subcontractor. This applies only to quotes specified as a subcontractor agreement, and information is cleared if this option is not selected.
  - **Resource Breakpoints** — Use this subtask to specify one or more breakpoints against a particular resource. Initially, the system defaults to a value equal to the total hours, if you do not manually add rows.
  - **Vendor Employees** — Use this subtask to request one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code in the line level.

Compute Vendor Performance (PPPVNDP)

The Compute Vendor Performance screen now has a new **Include Subcontractor Agreement and POs & Releases** check box. This allows you to include subcontractor agreement types of purchase orders in the computations for vendor performance. This screen option can be saved in the parameters. Initially, this will default to clear and excludes PO receipts for purchase orders with PO Type = Subcontractor Agreement or Subcontractor Agreement Release. If selected, this includes PO receipts for such types of POs.

View Vendor Quotes (PPQVQT)

These are the changes to this screen:

- **Subcontractor Agreement** — This check box indicates that the quote is for creating subcontractor agreements.
- **Resource Exists** — This check box indicates that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the requisition at the header level. This could be generic information related to the requisition as a whole, with additional statements of work at the line level, or it could contain all the information for the requisition and requisition lines. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Resources** — Use this subtask to specify the details of the resources of the subcontractor. This applies only to quotes specified as a subcontractor agreement, and information is cleared if this option is not selected.
  - **Resource Breakpoints** — Use this subtask to specify one or more breakpoints against a particular resource. Initially, the system defaults to a value equal to the total hours, if you do not manually add rows.
  - **Vendor Employees** — Use this subtask to request one or more vendor employees against a particular resource.
- **Line SOW** — Use this subtask to specify the detailed statement of work on the line level. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code in the quote line.

Configure Receiving Settings (RCMSET)

These are the changes to this screen:

- **Auto-Assign IDs (Subcontractor Agreements)** — Use this group box to auto-assign packing slips and receipt IDs. This enables you to automatically create receiving data for three-way match PO lines for subcontractor agreement types of PO.
  - **Auto-Assign Packing Slip Numbers** — Select this check box to activate the three options available:
    - **PO Voucher Number** — Select this option for the receipts created to have the **Packing Slip No** field auto-assigned with a value equal to the **PO Voucher Number.**
    - **Subcontractor Invoice Number** — Select this option for the receipts created to have the **Packing Slip No** field auto-assigned with a value equal to the **Subcontractor Invoice Number**.
    - **Last Packing Slip No** — Select this option for the receipts created to have the **Packing Slip No** field auto-assigned with a value equal to the **Last Packing Slip**

No. The field is enabled if the **Last Packing Slip No** is selected. If cleared, use standard validation to require last four numbers, if entered, in order to increment.

If the Configure Receiving Settings screen has **Require Packing Slip** selected, and a default Packing Slip is not provided by the user, the system will automatically assign the next packing slip (last packing slip number + 1) to the voucher and also update the **Last Packing Slip No** with the new value.

- **Auto-Assign Receipt IDs** — Select this check box to activate the three options available:
  - **PO Voucher Number** — Select this option for the receipts created to have the receipt ID field auto-assigned with a value equal to the **PO Voucher Number**.
  - **Subcontractor Invoice Number** — Select this option for the receipts created to have the receipt ID field auto-assigned with a value equal to the **Subcontractor Invoice Number** on the PO voucher.
  - **Last PO Receipt ID** — Select this option for the receipts created to have the receipt ID field auto-assigned with a value equal to the Last PO Receipt ID + 1. The field is enabled if the Last PO Receipt ID is selected. If cleared, use standard validation to require last four numbers, if entered, in order to increment.

If a default receipt and warehouse are not provided, the system automatically assigns the next receipt ID (last PO receipt ID + 1) to the voucher, and also update the **Last PO Receipt ID** with the new value.

Subcontractor Agreement PO vouchers will ignore the **Require Location for Non-Inventory Receipts** option in Configure Receiving Settings. Receipts for this type of PO will not require a warehouse location.

Manage Purchase Order Receipts (RCMPORC)

These are the changes to this screen:

- The Query now includes the PO Type, which when selected results to the following:
  - The qualifier field drop-down list will have **is equal** and **is not equal** options.
  - The value field will have a drop-down list showing GFM/GFE Orders, Purchase Orders, Release Orders, Subcontractor Agreement, and Subcontractor Agreement Release.
  - The query result will only retrieve receipts for purchase orders with the matching PO Type.
- Costpoint now allows you to add new receipts against 3-way match PO lines for PO types of Subcontractor Agreement or Subcontractor Agreement Release, as long as there are no associated work assignments. For these receipt lines, validations related to required warehouse locations are suppressed because these validations do not apply to subcontractor agreements.
- The validation on PO line field in the client transaction window does not allow a PO line for a subcontractor agreement or Subcontractor Agreement Release type of PO if it has associated work assignments.
- Costpoint does not allow neither changes nor deletions to a receipt line that corresponds to a PO line that has associated work assignments. When deletion is permissible, you must also delete the corresponding voucher line; this, in turn, deletes the corresponding receipt line.

Import Purchase Orders (AOPUTLPO)

These are the changes to this screen:

- Costpoint now allows new PO types such as Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release.

  The selected buyer must be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. The Lookup in the **Buyer** field will filter out those who are not authorized to enter at least one of these PO types.
- **Security Requirements tab (form view)** — Use this tab to display the default security requirements of any resources that are used for the purchase order.
- **Resource Exists (line level)** — Select this check box to indicate that resources have been specified on the Resources subtask for that line. This check box is always disabled. The system will mark this box as selected if there are one or more rows on the Resources subtask for the requisition line.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the requisition at the header level. This could be generic information related to the requisition as a whole, with additional statements of work at the line level, or it could contain all the information for the requisition and requisition lines. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Line SOW** — Use this subtask to specify the detailed statement of work on the line level. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Resources** — Use this subtask to specify the details of the resources of the subcontractor. This applies only to quotes specified as a subcontractor agreement, and information is cleared if this option is not selected.
  - **Resource Breakpoints** — Use this subtask to specify one or more breakpoints against a particular resource. Initially, the system defaults to a value equal to the total hours, if you do not manually add rows.
  - **Vendor Employees** — Use this subtask to request one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code in the quote line.

Import Vendor Quotes (AOPQTV)

These are the changes to this screen:

- Costpoint now allows new PO types such as Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release.

  The selected buyer must be authorized to enter a PO type of Subcontractor Agreement, Subcontractor Agreement Blanket, or Subcontractor Agreement Release. The Lookup in the **Buyer** field will filter out those who are not authorized to enter at least one of these PO types.
- **Security Requirements tab (form view)** — This tab displays the default security requirements of any resources that are used for the purchase order.

The following new subtasks are added to this application:

- **Header SOW** — Use this subtask to specify the SOW for the requisition at the header level. This could be generic information related to the requisition as a whole, with additional statements of work at the line level, or it could contain all the information for the requisition and requisition lines. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Line SOW** — Use this subtask to specify the detailed statement of work on the line level. This applies even if the RFQ has not been specified as a subcontractor agreement.
- **Resources** — Use this subtask to specify the details of the resources of the subcontractor. This applies only to quotes specified as a subcontractor agreement, and information is cleared if this option is not selected.
  - **Resource Breakpoints** — Use this subtask to specify one or more breakpoints against a particular resource. Initially, the system defaults to a value equal to the total hours, if you do not manually add rows.
  - **Vendor Employees** — Use this subtask to request one or more vendor employees against a particular resource.
- **Link SCI/SAP Security Codes** — Use this subtask to specify the security clearance code in the quote line.

Manage Standard Text (PDMTEXT)

These are the changes to the Where-Used subtask of this screen:

- New row to the system-maintained S_WHERE_USED table. This new row will have a code of “G” and a description of Subcontractor Invoice.
- New **Subcontractor Invoice** option to the **Where-Used Description** list.
- Lookup on the Where-Used Code (in the selected list) should include the above new code and description. If the “G” code is selected from Lookup, or entered manually, then the corresponding description is loaded.
- The **Automatically Default** field is initially cleared. You can select it, if needed.
- The **Default Seq No** is initially blank. If the **Automatically Default** field is selected, this defaults to zero and can be left as is, or changed to another number, but is required in this case.

Import Subcontract Retainage PO Status Updates (AOPSCST)

The application name was updated from Import Subcontract PO Status Updates to Import Subcontract Retainage PO Status Updates to make it consistent with the updated PO type in Costpoint.

Manage Quality Control Inspections (RCMINSP)

The modification in this application prevents you from entering Subcontractor Agreement receipts in quality control (QC) inspections.

You now get an error message for Receipt IDs with PO Type A and L (QC Inspections are not applicable to Subcontractor Agreement POs).

The **PO Receipt** Lookup now filters out POs with the Subcontractor Agreement and Blanket type (K, L, A, and B). PO Type S is already filtered out.

Manage Security Clearance Settings (APMSCSET)

This new screen in the Accounting domain (**Accounting » Accounts Payable » Vendor and Subcontractor Controls » Manage Security Clearance Settings**) is also available in the Materials domain (**Materials » Purchasing » Purchasing Codes » Manage Security Clearance Settings**). Use this screen to configure the security clearance codes and the level of security clearance for vendor employees.

Manage SCI/SAP Clearance Codes (APMCLRCD)

This new screen in the Accounting domain (**Accounting » Accounts Payable » Vendor and Subcontractor Controls » Manage SCI/SAP Clearance Codes**) is also available in the Materials domain (**Materials » Purchasing » Purchasing Codes » Manage SCI/SAP Clearance Codes**). Use this new screen to set up security clearance codes for Sensitive Compartmented Information (SCI) and/or Special Access Program (SAP).

Import Purchase Requisitions (AOPRQPP)

These are the enhancements made to the Import Purchase Requisitions application.

- **Requisition Header Record** — This includes the following updates:
  - Added Subcontractor Agreement flag to indicate that the requisition is for a Subcontractor Agreement
  - Added new fields to capture security requirements

  As a validation, you must be authorized for at least one type of Subcontractor Agreement PO in order to be a buyer in a requisition specified as a subcontractor agreement.
- **Requisition Header SCI/SAP Security Codes** — This is a new record type to link SCI/SAP Security Codes to the security clearance SCI/SAP option. The input values are ignored if the header Subcontractor Agreement flag = N. The input values are also ignored if the Requisition header security clearance does not have a security system ID with SCI or SAP clearance.
- **Requisition Header Statement of Work** — This is a new record type to capture the SOW associated with the requisition header. You can add one or more SOWs to the requisition at the header level. This could be generic information related to the requisition, with additional SOW at the line level, or it could contain all information for the requisition and the requisition lines.
- **Requisition Line** — New fields have been added to capture security requirements.
- **Requisition Line SCI/SAP Security Codes** — This is a new record type to link SCI/SAP Security Codes to the security clearance SCI/SAP option. The input values are ignored if the header Subcontractor Agreement flag = N. The input values are also ignored if the Requisition header security clearance does not have a security system ID with SCI or SAP clearance.
- **Requisition Line Statement of Work** — This is a new record type to capture the SOW associated with the requisition line. You can add one or more SOWs to the requisition at the line level. This could be the detailed SOW at the line level, in addition to the SOW at the header level.
- **Requisition Line Resources** — This is a new record type to capture resource requirements. You can specify one or more resources associated with a requisition line. This can be free-form text (description), or it can be loaded from a previously defined service type item/rev, which is the default. The input values are ignored if the Header Subcontractor Agreement flag = N.

- **Requisition Line Resource Vendor Employees** — This is a new record type to capture vendor employees associated with the requisition line resource specified. You can specify one or more vendor employees associated with a requisition line. The input values are ignored if the Header Subcontractor Agreement flag = N.
- **Vendor Employee subtask** — Use this subtask to request one or more vendor employees against a particular resource.

Input file changes applies to fixed length as well as delimited formats. Additional database changes are required to support changes via staging tables (STG*).

Administration Domain

This section includes summaries of changes made in relation with the Subcontractor Management feature within the Costpoint Administration domain.

System Administration

Rebuild Global Settings (SYPSTNG)

Subcontractor Management is now available as an option you can choose under **Individual Settings**. When you select this option, the application will perform the synchronization on the new settings screen, Configure Subcontractor Management Settings.

Set Up Company (SYPCOMP)

Set Up Company now includes the information on the new settings screen, Configure Subcontractor Management Settings, in copying settings from one company to another.

New logic has also been added to this application to copy the new rules on the Configure Receiving Settings screen when creating a new company by copying an existing company.

The Set Up Company process now accepts default values for the new fields that were added on the Configure Accounts Payable Settings and Configure Vendor Settings screens.

Appendix: For Additional Information

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Access Cloud specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Customer Care analyst online

For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and Password.
3. Click Log In.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.