Deltek Costpoint® 7.1.1

Cumulative Release Notes for November 2017

November 27, 2017

Contents

Overview

This document is a compilation of the release notes distributed for the enhancements made in Costpoint, Budgeting and Planning, and Time & Expense that are released in November 2017. This document includes descriptions of the enhancements in relation with system jars, application jars, libraries, and regulatory updates since the last system jar release.

Platform Changes

There are no changes to this to the platform for this release.

Installation Instructions

Custom Programs Affected

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

To Download the HotFix/Feature Update:

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

To Install the HotFix/Feature Update:

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

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

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

To Check to See if the HotFix is Installed:

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

To Check to See if the Feature is Installed:

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

Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

More Information:

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

Costpoint

Release Notes

A new section, Release Notes, was added to the Table of Contents. From this location you can access (with an Internet connection) all related monthly release notes, as well as Costpoint 7.1.1 and Time & Expense 10 overall cumulative enhancements documents.
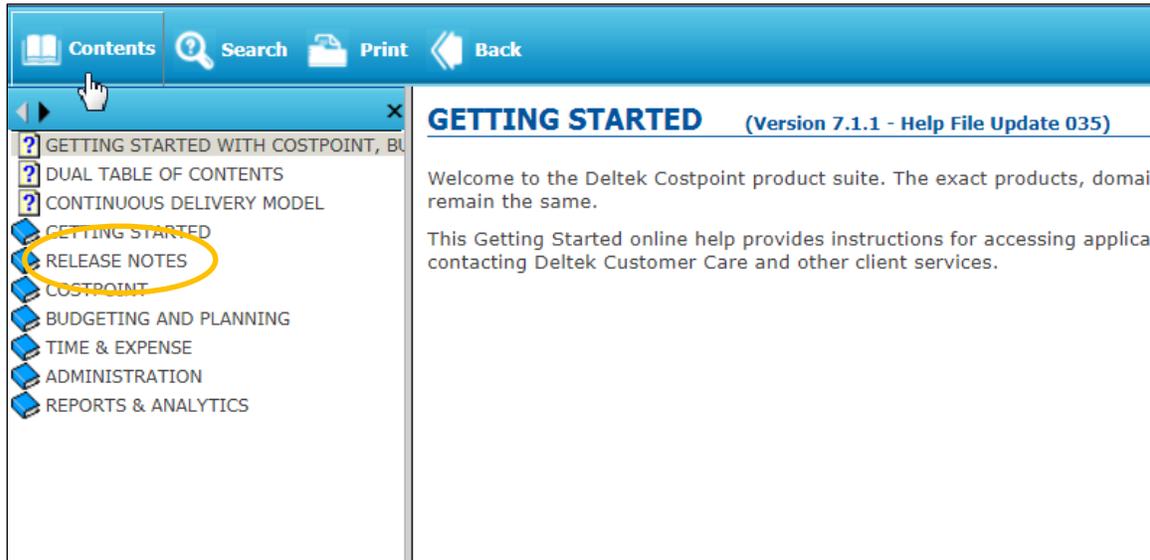
Accounting

CAGE Code Field on the Manage Vendors Screen

A new field is now available on the Manage Vendors (APMVEND) screen where you can track the CAGE Code of your vendors.

This enhancement requires the following:

- cp711_sys_035.zip
- PATCH3222
- PATCH3233
- PATCH3265
- PATCH3286

Application JAR Requirement

Domain	Module	Application ID	Application Name	Application File
Accounting	Accounts Payable	APMVEND	Manage Vendors	cp711_apmvend_006.zip

CAGE Code Field in the Import Vendors Report

A new CAGE Code field is now available in the Import Vendors Report where you can view your vendors' CAGE Code.

This enhancement requires the following:

- cp711_sys_033.zip
- cp711_sys_032.zip
- PATCH3265
- PATCH3222
- PATCH3233
- PATCH3286

Application JAR Requirement

Domain	Module	Application ID	Application Name	Application File
Accounting	Accounts Payable	AOPUTLVU	Manage Vendors	cp711_aoputlvu_014.zip

Projects

There are no changes to this domain for this release.

Contract Management

Vendor and Vendor Employee Validation in Manage Vendors

In support of the future implementation of the Contract Management feature, a new validation was added to the Manage Vendors (APMVEND) application.

The Vendor ID and Vendor Employee IDs in APMVEND are checked to determine if there are duplicates in the Contract Management tables.

> This enhancement has no impact on current functionality.
>
> The functionalities of this update/enhancement is not available until the full feature is released.

Requirements

This enhancement requires:

- cp711_sys_035.zip
- PATCH3222
- PATCH3233
- PATCH3265
- PATCH3286

Application JAR Requirement

Domain	Module	Application ID	Application Name	Application File
Accounting	Accounts Payable	APMVEND	Manage Vendors	cp711_apmvend_006.zip

Patches for the Contract Management Feature

The following patches have been released in preparation for the future implementation of the Contract Management feature:

- PATCH3201
- PATCH3222
- PATCH3223
- PATCH3234
- PATCH3244
- PATCH3245
- PATCH3263
- PATCH3264
- PATCH3265
- PATCH3286
- PATCH3290
- PATCH3291
- PATCH3297

People

New Employee Days on Configure Benefit Settings

The Configure Benefit Settings screen contains a new field that allows you to specify the number of days that employees are classified as new employees. This setting will be used for benefit election purposes.

Patches and System JAR Requirements

This enhancement requires Costpoint 7.1.1 System JAR 035 and PATCH3238.

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application File
People	Benefits	HBMSET	Configure Benefit Settings	cp711_hbmset_001.zip

Regulatory and Compliance

Florida Reemployement XML Report Update

The Costpoint Software ID for Florida SUTA electronic filing was updated in this release.

Application JAR Requirements

Domain	Module	Application ID	Application Name	Application File
People	Payroll	PRPSMM	Create Quarterly SUTA Tax File	cp711_prpsmm_018.zip

Materials Management

WA250 Output for Packing Slips

With the advent of iRAPT(Invoicing, Receipt, Acceptance, and Property Transfer) the submission of DD250s now occurs electronically, with limited exceptions. You may either use the government's web application or use an iRAPT-automation system to create and submit electronic data interchange (EDI) transactions. iRAPT is the government's web-based system for accepting, processing, and distributing the DD250.

A specialized iRAPT version of the DD250 (WA250) includes distinctive fields that simplify preparation of iRAPT receiving reports, invoices, and combos.

In view of these changes, Costpoint has been updated and new applications have been added to support the printing of WA250 form as an option for users to print the WA250 when they are unable to use the iRAPT but need to electronically submit the DD250.

These new applications, under the Sales Order Entry module, are the Print WA250 Invoices (OERW250) screen (**Materials » Sales Order Entry » Sales Order Invoices » Print WA250 Invoices**) and the Print WA250 Packing Slips (OERW250P) screen (**Materials » Sales Order Entry » Sales Order Shipping » Print WA250 Packing Slips**).

For this enhancement, new Costpoint screens include the corresponding functions:

Print WA250 Packing Slips (OERW250P)

Use this new screen (**Materials » Sales Order Entry » Sales Order Shipping » Print WA250 Packing Slips**) to print a packing slip for the WA250.

This new screen has the following subtasks:

- Catalog Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of catalogs that you want to print WA250 packing slips for.
- Customer Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of customers that you want to print WA250 packing slips from.
- Invoice Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of packing slips that you want to print.

- Project Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of projects that you want to print WA250 packing slips for.
- Sales Order Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of sales orders that you want to print packing slips for.

Print WA250 Invoices (OERW250)

Use this new screen (**Materials » Sales Order Entry » Sales Order Invoices » Print WA250 Invoices**) to print a report for the WA250.

This new screen has the following subtasks:

- Catalog Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of catalogs that you want to print WA250 invoices for.
- Customer Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of customers that you want to print WA250 invoices from.
- Invoice Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of invoices that you want to print.
- Project Non-Contiguous Ranges – Use this subtask to define on-contiguous ranges of projects that you want to print WA250 invoices for.
- Sales Order Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of sales orders that you want to print invoices for.

Configure Sales Order Entry Settings (OEMSET)

The following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Configure Sales Order Print Options (OEMPOPTS)

The following screen labels have been renamed:

- **Line No on DD250** to **Line No on DD250/WA250**
- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manages Sales Orders (OEMNTS01)

On the Order Details tab, the following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Invoices (OEMINVC1)

On the Print Info tab, the following screen labels have been renamed:

- **Print DD250 Invoice** to **Print DD250/WA250 Invoice**
- **DD250 Invoice Printed** to **DD250/WA250 Invoice Printed**

Manage Sales Order Catalog Defaults (OEMCATLG)

The following screen labels have been renamed:

- ▪ **DD250 Invoice** to **DD250/WA250 Invoice**
- ▪ **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Sales Order Project Defaults (OEMPROJ)

The following screen labels have been renamed:

- ▪ **DD250 Invoice** to **DD250/WA250 Invoice**
- ▪ **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Shipping Transactions (OEMSHIP)

On the Shipping Information tab, the following screen labels have been renamed:

- ▪ **DD250 PS Printed** to **DD250/WA250 PS Printed**
- ▪ **DD250 PS** to **DD250/WA250 PS**

Print DD250 Invoices (OER250I)

On the Print Options, under Actions tab, the check box has been renamed from **Execute Update DD250 Invoice Printed flag after reports are printed** to **Execute Update DD250 Invoice Printed flag after reports are printed**.

In addition, application logic has been modified so that when you run the **Update DD250/WA250 Printed flag**, the application selects the DD250/WA250 Invoice Printed check box on the Manage Invoices (OEMINVC1)/Manage Invoices Supervisor Screen (OEMINVC2).

Patch and System JAR Requirements

These enhancements require the following:

- ▪ Costpoint 7.1.1 System JAR 031 (cp711_sys_031.zip)
- ▪ Costpoint 7.1.1 System JAR 034 (cp711_sys_034.zip)
- ▪ Costpoint 7.1.1 System JAR 035 (cp711_sys_035.zip)

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application Name	Application ID	Application File
Materials	SO	Print WA250 Invoices	OERW250	cp711_oerw250_001.zip

Standard Costing

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

> This enhancement has no impact on current functionality.
>
> The functionalities of this updates/enhancements are not available until the full feature is released.

Standard costing enhancement features the following:

- New secure standard costing tables for item standard cost and project item standard cost

- New application to calculate future standard costs

- New application for purchase price variance (PPV)

- Ability to calculate and post variances for PPV and manufacturing costs (materials, labor, misc 1, misc 2, subcontractor) and corresponding overheads

- Ability to update item preprocessor for new cost tables

- Modified WIP variance process to include breakdowns for average actual and standard costing

This update requires PATCH3170

Administration

Select a Default Application on the Manage Users (SYMUSR) Screen

The new **Default Application ID** and **Application Name** fields on the **User Interface** tab on the Manage Users (SYMUSR) screen enables the System Administrator to select an application that will automatically display when a user logs in to Costpoint.

This enhancement requires PATCH7137

Select a Default Application on the User Preferences (UPMUSRPR) Screen

The new **Default Application** and **Application Name** fields on the User Preferences (UPMUSRPR) screen enables you to select an application that will automatically display when you log in to Costpoint.

This enhancement requires PATCH7137

Reports & Analytics

There are no changes to this domain for this release.

Budgeting and Planning

There are no changes to Deltek Budgeting and Planning for this release.

Time & Expense

Time

Save Default Values for Timesheet Export

A **Save Defaults** button was added to the **Time » Interfaces » Export Timesheets** screen. Click this button to save the current field settings as default values for future use.

A **Reload Defaults** button was also added. Click this button if, having entered new values, you want to revert to the previously saved values.

When you click **Save Defaults**, values entered in the following fields are either saved or not saved as indicated in the following list:

- Basic fields:
    - Saved values include: **Timesheets**, **Subcontractor Export**, and **Costpoint Company**.
    - **Batch ID** and **ADP Filename** are *not* saved.
- **Export Options –** All values in this section are saved.
- **Print Options –** All values in this section are saved.
- **Export to Costpoint Options –** No values in this section are saved.
- **Auto Adjust Options for Regular Timesheets –** All values in this section are saved.
- **Timesheet Generation –** All values in this section are saved.
- **Default Information –** No values in this section are saved.

Application JAR Requirements

The following table shows the required application JAR version for the screens affected by this update:

Domain	Module	Application ID	Application Name	Application File
TE	Time	TMPEXPORTTS	Export Timesheets	cp711_te_tmpexportts_005.zip

Manage Timesheets Application Toolbar Improvements

The directional arrows in the Manage Timesheets screen were modified to make them function in the same way they did in earlier versions of Time & Expense.

In Form view, the application opens to the current timesheet by default. Prior to this update, clicking the left arrow displayed the next (future) timesheet period, and clicking the right arrow displayed the previous (earlier) timesheet period. This was opposite of how the arrows functioned in version 9.x.

To simplify navigation between timesheet periods, the following updates were made:

| Button	Module
◄◄	This button was removed from the application toolbar.
◄	Clicking this directional arrow displays the timesheet of the previous (earlier) pay period. Prior to this update, clicking this arrow displayed the next timesheet period.
►	Click this directional arrow to display the timesheet for the next pay period. Prior to this update, clicking this arrow displayed the last timesheet period.
►►	This button was removed from the application toolbar.

To further simplify the Manage Timesheets toolbar for end users, a new **Toolbar Controls** option was added to **Options » Show/Hide Screen Controls.** This enables administrators (when logged on using an administrator profile) to remove (hide from view) the Table/Form and Query buttons.

If you have administrator privileges and want to hide application toolbar buttons, complete the following steps:

1. Log on using your administrator profile.

2. Open the Screen Configuration panel by either selecting **Screen Configuration** from the Options menu or by clicking 👤 on the top-right corner of your Costpoint screen.

3. From the Administrator Panel drop-down list, select the user profile that corresponds to the timesheet users for whom you want to hide application toolbar buttons.
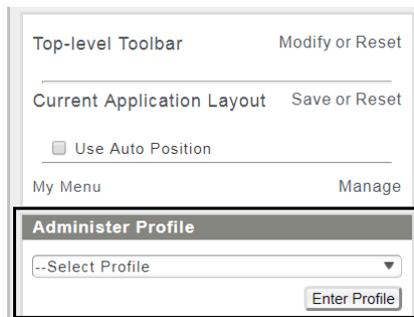
4. Click **Enter Profile**.

5. Click **Time » Timesheets » Manage Timesheets**.

6. Click **Options » Show/Hide Screen Controls**.

7. In the Show/Hide Screen Controls screen, select **Toolbar Controls**.

   Note that this option only displays in User Profile mode.

8. In the table, click the **Always Hide** check box next to each toolbar option you want to hide and click **Apply**.

Requirements

The enhancement requires cp711_sys_035.zip.

Manage Timesheets Header Interface Simplification

The header area of the **Time » Timesheets » Manage Timesheets** screen was updated to remove fields that display information that employees already know. These include the following fields:

- Revision
- Class
- UDT (01-15) or other configured value (an employee code, for example)

Additionally, the Notes tab was also removed, since it is not used by employees, and the **Sign** button was moved to the lower right-hand area to align with other screen buttons.

Image of screen before update:
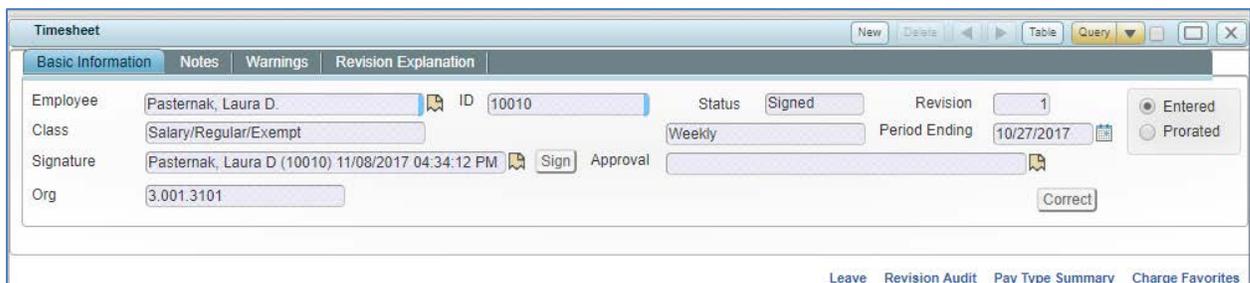
Image of screen after update:
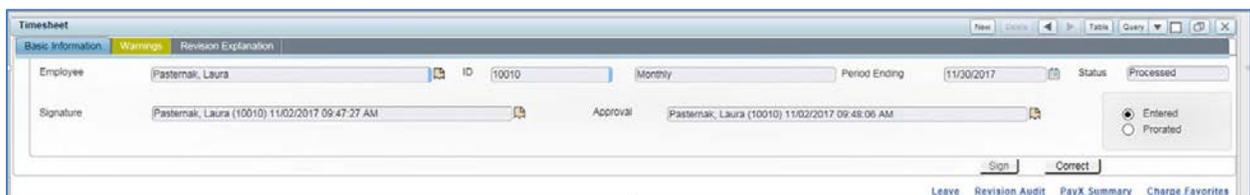
These fields and the Notes tab were *not* removed from **Time » Timesheets » Manage/Approve Timesheets**.

Requirements

The enhancement requires cp711_te_common_007.zip.

Application JAR Requirements

The following table shows the required application JAR version for the screens affected by this update:

Domain	Module	Application ID	Application Name	Application File
TE	Time	TMMTIMESHEET	Manage Timesheets	cp711_te_tmmtimesheet_009.zip

Expense

Changes to Subtasks on New Expense Reports

The **Expense Reports » Manage Expense Reports** and the **Expense Reports » Manage/Approve Expense Reports** screens were updated so that the following subtasks no longer display on newly created expense reports, since they are not applicable:

- Advances
- Billable
- Charge Distribution
- Company Paid
- Non-Reimbursable
- Payment
- Revision History
- Workflow

Requirements

The enhancement requires cp711_te_common_007.zip.

Application JAR Requirements

The following table shows the required application JAR version for the screens affected by this update:

Domain	Module	Application ID	Application Name	Application File
TE	Expense	EPMEXPRPT	Manage Expense Report	cp711_te_epmexprpt_009.zip
TE	Expense	EPMEXPAUTH	Manage Expense Authorization	cp711_te_epmexpauth_006.zip

Changes to Subtasks on New Expense Authorizations

The **Expense Authorizations » Manage Expense Authorization** and the **Expense Authorizations » Manage/Approve Expense Authorizations** screens were updated so that the following subtasks no longer display on newly created expense authorizations, since they are not applicable:

- Revision History
- Charge Distribution
- Workflow

Requirements

The enhancement requires cp711_te_common_001.zip.

The enhancement requires cp711_te_common_003.zip.

Application JAR Requirements

The following table shows the required application JAR version for the screens affected by this update:

Domain	Module	Application ID	Application Name	Application File
TE	Expense	EPMEXPRPTAPPROVE	Manage/Approve Expense Reports	cp711_te_epmexprptapprove_003.zip
TE	Expense	EPMEXPAUTHAPPROVE	Manage/Approve Expense Authorization	cp711_te_epmexpauthapprove_003.zip

Configuration

There were no changes to Configuration for this release.

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