Deltek

Deltek Costpoint Hot Fix Readme

Release Date: November 29, 2018

Opportunity Reports

Three new reporting screens are now available in the Contracts domain. These applications allow you to generate reports that display specific opportunity information. These screens are available only if you are licensed for Contract Management.

Screen Updates

The following applications have been created for this enhancement.

Print Opportunity Current Pipeline Report (OPRCPL)

Use this new screen to print the Opportunity Current Pipeline Report. This report lists all your current pipeline data, which you can use to determine the opportunities your company is currently working on.

The report displays the probability of winning the opportunity, the expected total contract value, and weighted revenue for each opportunity. It also gives information on the primary customer for the opportunity, the opportunity stage, the estimated start date of the contract associated with the opportunity, and the employee who acts as the business unit lead for the opportunity.

Different sorting selections and an option to include inactive opportunities are available on the Print Opportunity Current Pipeline Report screen.

This application pulls only opportunities in stages that have the **Include In Current Pipeline** check box selected on the Manage Opportunity Stages screen.

You can open this application through **Contracts » Opportunities » Opportunity Reports and Inquiries » Print Opportunity Current Pipeline Report**.

Print Opportunity Days Open Report (OPROPN)

With this new screen, you can print a report that displays the number of days the opportunities were open and also lists opportunities as won or loss. You can use these data to determine how much time you are spending on opportunities and see any concerning patterns.

The Opportunity Days Open Report also displays the opportunity type, opportunity stage, and weighted revenue for each opportunity. Only opportunities in stages that have a **Win / Loss** value of **Win** or **Loss** on the Manage Opportunity Stages screen are included in the report.

You can include inactive opportunities in the report. You also have the option to sort the report by opportunity stage, weighted revenue, date opened, or days open.

To access this screen, go to **Contracts » Opportunities » Opportunity Reports and Inquiries » Print Opportunity Days Open Report**.

Print Opportunity Win Loss Report (OPRWLS)

This new application allows you to print the Opportunity Win Loss Report, which contains a list of opportunities grouped and subtotaled by the win/loss stage. The report also includes information on the weighted revenue, the expected total contract value, and the probability of winning each opportunity. This data can help you determine if you are going after the right types of opportunities.

The report can include inactive opportunities and can be sorted by probability %, opportunity name, primary customer name, our value, or weighted revenue.

This application pulls only opportunities in stages that have a **Win / Loss** value of **Win** or **Loss** on the Manage Opportunity Stages screen.

You can access this application by clicking **Contracts » Opportunities » Opportunity Reports and Inquiries » Print Opportunity Win Loss Report**.

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 ID	Application Name	Application File
Contracts	Opportunities	OPRCPL	Print Opportunity Current Pipeline Report	cp711_oprcpl_001.zip
Contracts	Opportunities	OPROPN	Print Opportunity Days Open Report	cp711_opropn_001.zip
Contracts	Opportunities	OPRWLS	Print Opportunity Win Loss Report	cp711_oprwls_001.zip

More information about this release is on the following page.

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 Hot Fix/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 Hot Fix/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 Hot Fix is Installed

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

To Check to See if the Feature is Installed

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

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

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center 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 Deltek Support Center 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 Support Center Community

- 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

- Initiate a Chat to submit a question to a Customer Care analyst online

> **Attention:** For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

> **Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

About Deltek

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