Deltek

Deltek Costpoint Hot Fix Readme

Release Date: November 29, 2018

Competitor Tracking in Contract Management

Costpoint now gives you the ability to identify competitors and track them against an opportunity. A new screen has been created and several others have been updated for this enhancement.

Screen Updates

Manage Competitors (CTMCMPT)

Use this new screen to identify and maintain information for competitors against opportunities that your company wants to pursue. You can establish a unique ID for these competitors as well as identify their size, strengths, and weaknesses. You can use this information to accurately assess the types of businesses that are competing for the same work. This data can also help you on teaming decisions with other vendors and/or decisions on moving forward with the bid and proposal process.

Once you have set up competitor information on this screen, you can associated the competitor with opportunities on the Manage Opportunities screen.

To access this application, go to **Contracts » Resources » Competitor Information » Manage Competitors**.

Manage Opportunities (CTMOPP)

These are the updates to the Opportunity Teammates subtask of this screen:

- The subtask has been renamed to Opportunity Teammates/Competitors.

- The **Prime/Subcontractor** drop-down list has been renamed to **Teammate/Competitor**.

- You can now select **Competitor** from the **Teammate/Competitor** drop-down list and link a competitor to an opportunity. Changes to the following fields have been applied when **Competitor** is selected:

  - **Type** — This field displays **Competitor** when you enter a competitor ID in the **ID** field.

  - **ID** — Enter, or click lookup to select, a competitor ID. Note that only active competitors are displayed in the lookup, but you can manually enter an inactive competitor.

  - **Name** — This field displays the competitor name.

  - **Role Description** — Enter, or click lookup to select, the role that you want to assign to the competitor. Valid values are only those that exist on the Manage Contract Management Roles screen and for which the **Competitors** check box is selected.

  - The Vendor Employees subtask and the following fields are inactive for competitors:

    - **Include in Work Force**

- **PLC**
- **Default PLC**
- **Address Code**
- **Address 1**
- **Address 2**
- **City**
- **State/Province**
- **Zip/Postal Code**

Manage Contract Management Roles (CTMROLES)

A new column, **Competitors**, has been added to this screen to allow you to identify competitor-specific roles. A new system-defined (**COMP**) role code with a corresponding **Competitor** role description has also been added. You can select the **Competitors** check box in the new column for both user- and system-defined codes.

Another update is the change of the **Teammates** label to **Subcontractors**.

Configure Contract Management Settings (CTMSETNG)

This application has been modified to allow you to indicate whether Costpoint should automatically number the competitor ID on the Manage Competitors screen. Two new fields are added to Configure Contract Management Settings, as follows:

- **Auto-Assign Competitor IDs** — Select this check box to have Costpoint automatically assign an ID to any new competitor record.

- **Last Competitor ID** — Enter the last competitor ID used. Make sure that the value has ample numeric digits at the end. You can enter up to 15 numeric digits in this field. This field is required when you select the **Auto-Assign Competitor IDs** check box.

Manage Contracts (CTMCNTR)

This application has been updated to accommodate the label change of **Teammates** to **Subcontractors** on the Manage Contract Management Roles screen. The **TEAMMATES_FL** field that is used in the lookup of the **Role Description** field on the Contract Teammates and Vendor Employees subtasks has been replaced with **SUBCONTRACTOR_FL** in the CNTR_TEAMMATES and CNTR_TEAMMATES_EMPL tables.

System Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 047 (cp711_sys_047.zip)
- cp711_sypcomp_023.zip
- PATCH3467
- PATCH3491
- PATCH3552
- PATCH3561

- PATCH3568

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	Contract Management Controls	CTMROLES	Manage Contract Management Roles	cp711_ctmroles_003.zip
Contracts	Contract Management Controls	CTMSETNG	Configure Contract Management Settings	cp711_ctmsetng_005.zip
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_011.zip
Contracts	Opportunities	CTMOPP	Manage Opportunities	cp711_ctmopp_011.zip
Contracts	Resources	CTMCMPT	Manage Competitors	cp711_ctmcmpt_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

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

Deltek