Deltek

Deltek Costpoint® Essentials and Costpoint Foundations

Cloud Release Notes

February 28, 2019

This edition published February 2019.

Contents

Overview

This document is a compilation of enhancements made in Costpoint, Budgeting and Planning, and Time & Expense between January 1 – February 6, 2019, and which will be available in the Cloud as of February 28, 2019.

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

Costpoint

Accounting

There are no changes to Costpoint Accounting in this release.

Contracts

There are no changes to Costpoint Contracts in this release.

Projects

New Application for Subcontractor Details: Manage Open Subcontractor Detail

A new application, Manage Open Subcontractor Detail, is now available under Subcontractor Management. This screen allows you to:

- Review detailed subcontractor timesheet and expense information that you have imported from Deltek Time & Expense into Costpoint. You can specify the work assignment, purchase order, release number, vendor, vendor employee, fiscal year, period, expense report, and expense report date for which you want to view subcontractor information.
- Put timesheet and/or expense records on hold until a subsequent period by selecting the **Hold** check box corresponding to the timesheet/expense line. Records that are put on hold will not be included when you create invoices and vouchers. You can clear the **Hold** check box any time you want to release the timesheet/expense line from hold.
- Delete timesheet and/or expense records. This is important when there are incorrect records that may be due to reprocessing of timesheets or expense reports, or records that were pulled into invoices but then later found to be non-billable.

Note, however, you can delete or put timesheet/expense records on hold only if they are not included in invoices or vouchers (that is, both the **Invoiced** and **Voucher Created** check boxes are clear for the timesheet/expense line on the screen's table window).

For records that have been included in invoices/vouchers, you have to delete the invoice and/or voucher record associated with the timesheet/expense line before you can delete or put the timesheet/expense line on hold.

You can access this new screen by clicking **Projects » Subcontractor Management » Subcontractor Invoices » Manage Open Subcontractor Detail**.

> **Note:** Manage Open Subcontractor Detail is available only if you are licensed for Subcontractor Management and Deltek Time & Expense. In addition, you must have imported timesheet and/or expense data for subcontractors from Time & Expense before you can view subcontractor information on this screen.

The Create Subcontractor Invoices screen has been updated to exclude timesheet and expense records from the invoice creation process if these records are on hold.

Organizational Security Added to Manage Open Billing Detail

You can now enable or disable organizational security for the Manage Open Billing Detail application. When you select Billing (BL) in the Modules table window on the Activate/Inactivate Organization Security by Module screen, Manage Open Billing Detail (BLMOPEN) displays in the Applications table window. You can then select the corresponding Apply Org Security check box to apply organizational security to this application.

Once organizational security is enabled, Manage Open Billing Detail considers the organization security profile and group settings configured for the logged-in user ID on the Manage Organization Security Profiles and Manage Organization Security Groups screens.

This enhancement ensures that correct user access is applied to the logged-in user ID in accessing open billing transactions. The security for this application is based on the owning organization of the project being accessed.

For example, if the user has organizational security rights to organization 1.1.118, and queried a project with an owning organization of 1.1.118 in Manage Open Billing Detail, all transactions for this project are visible regardless of organization. However, when the user tries to view the transactions of a project with an owning organization of 1.1.120, the user will not have access to this project or its transactions. Find/Query and lookup of applicable fields in Manage Open Billing Detail have been updated to display only projects, organizations, and transactions authorized for the logged-in user.

People

There are no changes to Costpoint People in this release.

Regulatory and Compliance

For year-end regulatory documentation, see the Release Notes page of the Costpoint Cloud Information Center.

Materials Management

There are no changes to Costpoint Materials in this release.

Administration

Application to Manage Approval Workflow Cases

Use the new Manage Approval Workflow Case Status (WFMACASE) application to manage and monitor the status of a case, or multiple cases. In the application, you can:

- Display the current status of workflow model cases.
- Filter workflow model cases based on various criteria, such as:
- Case start and completion dates.
- Case status (In Process, Approved, Rejected).
- All cases currently assigned to a specific user.
- All cases approved or rejected by a specific user.
- Take action on an individual case or bulk action on multiple cases, such as:

- Initiate reminders and escalations for In Process cases.
- Redirect or delegate workflow cases.
- Reject workflow cases to the beginning of the model.
- Reject an individual case back to a specific activity or step.
- View the activity history (including rejection tracking) for individual cases.
- Delete workflow cases.

Designate Users as Workflow Model Owners

To enhance security for the new Manage Approval Workflow Case Status (WFMACASE) application, the new Approval Workflow Owners subtask in the Manage Approval Workflows (WFMAPPRL) application enables you to designate one or multiple users as owners of a workflow model. Only model owners can view, take action on, and/or delete related workflow model cases.

Reports & Analytics

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

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

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

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

Costpoint Integration

GovWin Capture Management to Costpoint Data Migration

The GovWin Capture Management to Costpoint Data Migration allows you to transfer customer (client), vendor, opportunity, and contract (project) information from GovWin Capture Management and use them in Costpoint Contract Management applications.

The purpose of this new feature is to help you to initially load your data into Costpoint if you are transferring systems from Capture Management to Costpoint Contract Management. This enhancement is designed to be used only during this transition phase.

After migrating your data to Costpoint you will be able to view your Capture Management records in the following Contract Management applications:

- Manage Contract Management Customer Info (CTMCUST)

- Manage Contract Management Vendor Info (CTMVEND)
- Manage Contracts (CTMCNTR)
- Manage Opportunities (CTMOPP)

Note: Since the data migration requires proper setup and accurate mapping of Capture Management fields to Costpoint fields, we recommend contacting Deltek's Technical Services team at DGSCONSULTANTS-PES@Deltek.com to ensure the best possible experience during this transition.

Application Changes

Integration Field Mapping (AOMCPMAP)

The new Integration Field Mapping screen allows you view the default field mapping that will be used by the Capture Management data migration process when transferring opportunity and contract records to Costpoint.

This screen allows the custom mapping of fields, if necessary. With the exception of key fields used by the migration, you can edit the default mapping and define the source of the data that goes into the target columns in Costpoint.

You can find this screen under the **Admin » System Administration » System Administration Interfaces** menu.

Migrate Capture Management Data (AOPCPDAT)

The new Migrate Capture Management Data screen allows you to select which set of data will be transferred from Capture Management to Costpoint. You can select to transfer Lookups, Client, Vendor, Opportunities, and/or Contract information. You can find this screen under **the Admin » System Administration » System Administration Interfaces** menu.

Attention: For more information on the default mapping of fields from Capture Management to Costpoint, please refer to the *GovWin Capture Management to Costpoint Data Migration Database Mapping Guide*.

Manage Contracts (CTMCNTR)

The Manage Contracts screen now supports the Capture Management data migration. The application inserts/updates records in the X_INTFC_ELEMENT_MAP table when you run the Migrate GovWin Capture Management process with the **Migrate CM Contract Data** check box selected on the Contract tab.

Manage Contract Management Vendor Info (CTMVEND)

The Manage Contract Management Vendor Info screen now supports the Capture Management data migration. The application inserts/updates records in the X_INTFC_ELEMENT_MAP table when you run the Migrate GovWin Capture Management process with the **Migrate CM Vendor Data** check box selected on the Vendor tab.

Manage Contract Management Customer Info (CTMCUST)

The Manage Contract Management Customer Info screen now supports the Capture Management data migration. The application inserts/updates records in the X_INTFC_ELEMENT_MAP table when you run the Migrate GovWin Capture Management process with the **Migrate CM Customer Data** check box selected on the Customer tab.

Manage Element Value Mapping (AOMAIEVM)

The Manage Element Value Mappings screen now supports the Capture Management data migration.

Manage Opportunities (CTMOPP)

The Manage Opportunities screen now supports the Capture Management data migration. The application inserts/updates records in the X_INTFC_ELEMENT_MAP table when you run the Migrate GovWin Capture Management process with the **Migrate CM Opportunity Data** check box selected on the Opportunity tab.

Known Issues

This section includes summaries of the issues that exist in this Costpoint release. These issues will be resolved in future releases.

Migrate Capture Management Data

- **Deltek Defect Tracking Number: 1059337**

  Description: When migrating vendors, defaulting errors occur because the application process includes the user-defined values from other Costpoint companies.

  Customers Impacted: This defect affects Costpoint users who run the data migration from GovWin Capture Management to Costpoint.

  Workaround Before Fix: Delete the user-defined values that exist in other Costpoint companies that will not be used for the migration.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 1059353**

  Description: When you attempt to migrate opportunities, a system error (Null pointer exception) displays and opportunity records do not migrate to Costpoint. This issue occurs when records exist on the User-Defined Info subtask of the Manage Opportunities screen.

  Customers Impacted: This defect affects Costpoint users who run the data migration from GovWin Capture Management to Costpoint.

  Workaround Before Fix: Delete all user-defined labels on the User-Defined Info subtask of the Manage Opportunities screen for all companies.

  Additional Notes: None.

Budgeting and Planning

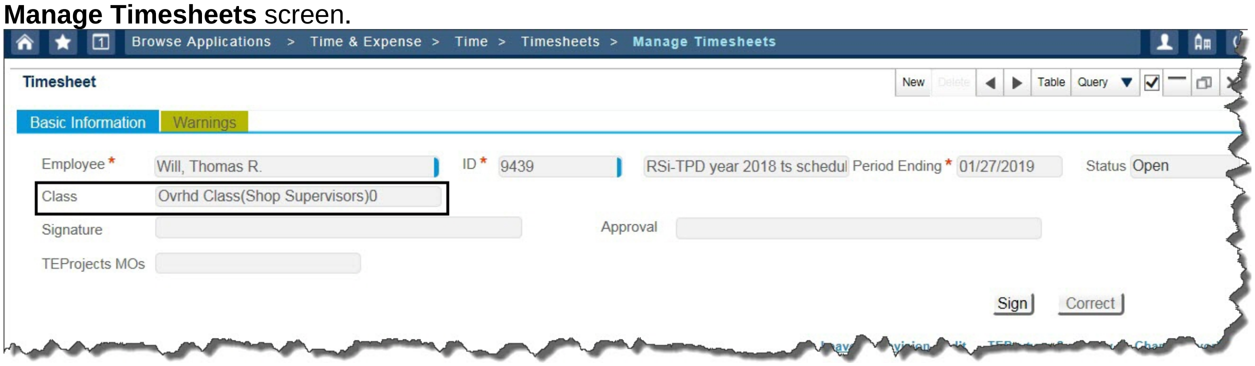
There were no updates to this area.

Time and Expense

Time

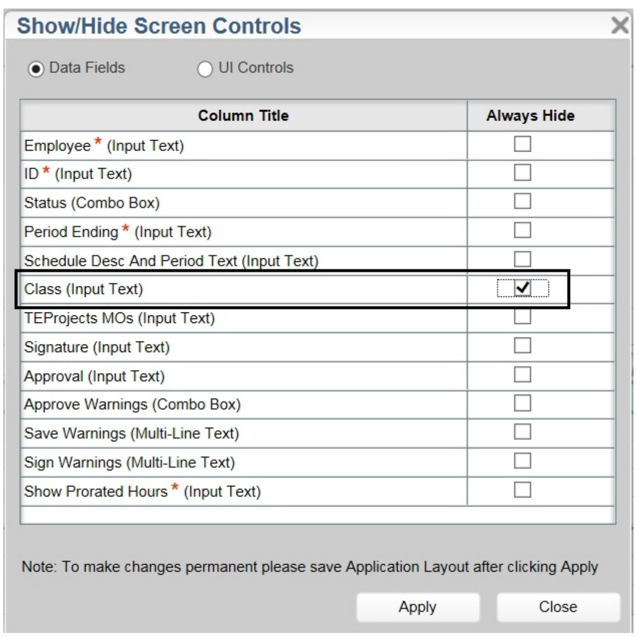
Timesheet Class Added to Manage Timehsheets

The Timesheet Class field was added to the header area of the **Time >> Labor >> Timesheets >> Manage Timesheets** screen.



If Costpoint is configured to allow employees to save personal screen configurations, the employee can hide the field using Screen Controls. To hide the field, the timesheet user should complete the following steps from the Manage Timesheets screen:

1. Right-click in the header area of the timesheet.
2. Click **Show/Hide Screen Controls** on the pop-up menu.
3. In the Show/Hide Screen controls dialog box, select the check box for **Class**.



Expense

There are no updates in this area.

Configuration

Import Process Modified to Allow Updating of Login IDs

There are no updates in this area.

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