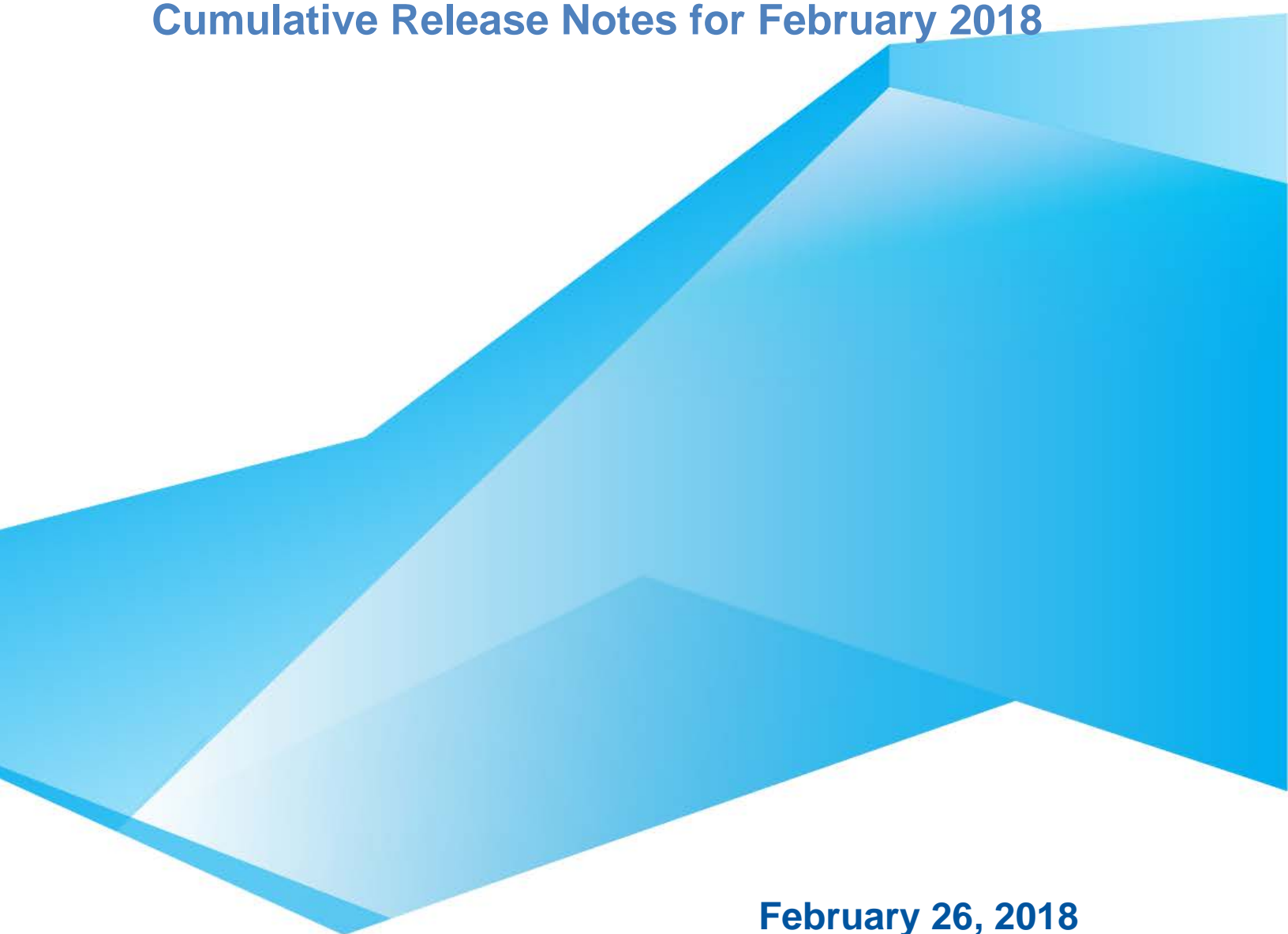# Deltek Costpoint® 7.1.1

Cumulative Release Notes for February 2018

February 26, 2018

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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 February 2018. 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

WebLogic 12.1.3 January 2018 CPU Support for Costpoint 7.1.1

The Costpoint 7.1.1 Framework installer has been updated to include support and compatibility with the WebLogic 12.1.3 Oracle Patch Update (January 2018) where patch p27057030_121300_Generic.zip is included.

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

Accounting

Remove Validation in Amount Fields in Rows

The Manage Non-Project Beginning Balances (GLMBEGIN) and the Manage Project Beginning Balances (GLMPJBEG) applications now allows zero values in the amount fields of the Transactional Currency Beginning Balances subtask. In this way, you can enter or update the amount fields for both transactional and functional and make them zero. This also allows you to correctly adjust the account beginning balances in transaction currency amount in cases where the transactional currency becomes zero, and the only balances are a functional balance for that currency.

In addition, you can now use USD as transactional currency when the functional currency is USD. The validation that requires a transaction currency before a functional currency row has been removed as well.

The system will still require that the Beginning Balance Amounts in the Transactional Currency Beginning Balances is the same with the amounts in the Account/Organization Details subtask.

System Requirements

This enhancement requires cp711_sys_038.zip.

Update Beginning Balances to Roll a Row for Currency Balances

The Update General Ledger Beginning Balances (GLPUPBB) application has been modified that will update beginning balances to roll a row in Currency Balances when only a row for the functional currency exists in the General Ledger.

This will allow reporting of the beginning balance in both transactional and functional currencies from a single table when the multicurrency setting is on.

Application JAR Requirement

Domain	Module	Application ID	Application Name	Application File
Accounting	General Ledger	GLPUPBB	Update General Ledger Beginning Balances	cp711_glpupbb_006.zip

Projects

Export Project Work Force to Deltek Talent Management

You can now export project data from Costpoint to Deltek Talent Management. This enhancement reduces the need for re-entering or duplicating project information (including project ID, project description, and the associated employee work force) in Talent Management. You can use this information in Talent Management to create project employee groups and track project employee performance.

> You can use the Transfer Talent Management Data screen available in the People domain to specify other information that you want to import from or export to Talent Management.

The following applications have been modified to support this enhancement.

Manage Project User Flow (PJMBASIC)

In the **Charging** group box of the Basic Info tab, the following check boxes are now available:

- **Export Project Work Force to Talent** — Select this check box to flag the project for transfer to Deltek Talent Management. A process in Talent Management will pull project details, including employee work force, from Costpoint for records that have this check box selected.

- **Allow Edit** — Select this check box to enable edits of the **Export Project Work Force to Talent** check box at the project's lower-level tasks.

Import Project Master Data (PJPPREP)

This application has been updated to incorporate the new check boxes added to the Manage Project User Flow screen. The input file layout of the PROJ.csv template includes two new columns:

- TLNT_FL
- TLNT_EDIT_FL

Mass Add Project Master Data (PJPMADD)

This screen has been updated to include the values of the new check boxes added to Manage Project User Flow when mass adding or updating projects.

Update Prior Year History (PJPUPPY)

This screen now includes the values of the new check boxes added to the Manage Project User Flow when updating prior year history for a project if the **Copy Project Setup Data to History Tables** check box is selected on this screen.

Compute Revenue (PJPCOMPR)

The new check boxes in Manage Project User Flow are now included in the audit history (PROJ_ADT) table. Compute Revenue has been updated to correctly populate these fields in the table if the **Track Revenue Setup Information on Compute Revenue** check box is selected on the Configure Project Settings screen.

System JAR and Patch Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 038 (cp711_sys_038.zip)
- Mass Add Projects Library (cp711_cmnlib_PJMASSADD_002.zip)
- PATCH3377

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
Projects	Cost and Revenue Processing	PJPCOMPR	Compute Revenue	cp711_pjpcompr_021.zip
Projects	Cost and Revenue Processing	PJPUPPY	Update Prior Year History	cp711_pjpuppy_007.zip
Projects	Project Setup	PJMBASIC	Manage Project User Flow	cp711_pjmbasic_024.zip
Projects	Project Setup	PJPMADD	Mass Add Project Master Data	Not applicable
Projects	Project Setup	PJPPREP	Import Project Master Data	cp711_pjpprep_022.zip

People

There are no changes to the People domain for this release.

Regulatory and Compliance

Allow HSA Account Selection in Direct Deposit

Costpoint now provides the functionality for Employee Self Service administrators to enable or disable the Health Savings Account (HSA) account selection on Direct Deposit screens. The following screens contain corresponding updates to support this enhancement:

Direct Deposit (ESMDIRDEP)

If you select the **Allow HSA Account Selection in Direct Deposit** check box on the Manage Taxable Entity Settings screen, the **Usage** drop-down list will be enabled and employees could designate if the bank account is for either Payroll deposit or HSA deposit. If the field is not enabled, the selection will default to Payroll deposit.

Life Events/New Hires (ESMLIFEEVENT)

If you select the **Allow HSA Account Selection in Direct Deposit** check box on the Manage Taxable Entity Settings screen, the **Usage** drop-down list on the Direct Deposit tab will be enabled and employees could designate if the bank account is for either Payroll deposit or HSA deposit. If the field is not enabled, the selection will default to Payroll deposit.

Patch Requirements

These enhancements require the following Costpoint 7.1.1 releases:

- PATCH3382
- Common lib – BENEFITSLIB (cp711_BENEFITSLIB_006.zip)

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	Employee Self Service	AOMESSCS	Manage Taxabale Entity Settings	cp711_aomesscs_011.zip
People	Employee Self Service	ESMDIRDEP	Direct Deposit	cp711_esmdirdep_009.zip
People	Employee Self Service	ESMLIFEEVENT	Life Events/New Hires	cp711_esmlifeevent_016.zip

Known Issues

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

Benefits Enrollment (ESMBENENROLL)

Deltek Defect Tracking Number: 894777

Description: An information message which instructs you to enter an HSA direct deposit account displays for all users when an HSA is elected. This message should display conditionally based on the new Allow HSA Account Selection in Direct Deposit check box on the Configure Taxable Entity Settings screen.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: The following message should only display if the Allow HSA Account Selection in Direct Deposit check box is selected: "You must enter direct deposit information for the HSA Account in 'Payroll and Benefit/manage Direct Deposit' before confirming your selections."

Life Events/New Hires (ESMLIFEEVENT)

Deltek Defect Tracking Number: 894531

Description: The application does not display an error message when confirming a Life Event with no Direct Deposit record but have HSA elections.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: The following error message should display in this scenario: "A direct deposit account with a Usage type of 'HSA' must be entered when an HSA is elected and deposited through direct deposit. The account must be active and the method must be 'Percent'."

West Virginia W-2 Electronic Filing

West Virginia now requires RV record containing IT-103 information in its EFW2 file format for tax year 2017. This Costpoint release includes updates to the Create State W-2 File screen to allow you to comply with the latest W-2 reporting requirement of West Virginia.

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	Payroll	PRPW2S	Create State W-2 File	cp711_prpw2s_013.zip

2018 February Tax Table Updates

This Costpoint release contains enhancements to support updates to State tax tables.

Oregon

Oregon revised its withholding tax formulas effective February 1, 2018. The following are the tax updates for Oregon:

- The federal tax adjustment amount increases from $6,550 to **$6,650** for an employee with annual wages up to $50,000.

- The federal tax adjustment phase out amounts changed in 2018 for an employee with annual wages of 50,000 or greater.

- The tax table changed for an employee with annual wages up to $50,000.

- The tax table changed for an employee with annual wages of $50,000 or greater.

- The allowance amount increases from $197 to **$201**.

- The standard deduction amount increases from $2,175 to **$2,215** for an employee filing "Single" with fewer than 3 allowances.

- The standard deduction amount increases from $4,350 to **$4,435** for an employee filing "Single" with more than 3 allowances.

- The standard deduction amount increases from $4,350 to **$4,435** for an employee filing "Married."

Virgin Islands

The following are the tax updates for Virgin Islands.

- The unemployment-taxable wage increases from $23,500 to **$24,200**.

- State tax tables were updated based from 2018 Federal tax tables.

Patch Requirements

These enhancements require Costpoint 7.1.1 PATCH3385.

IMPORTANT ANNOUNCEMENTS

Versions 7.0.1 and 7.1.1 Calendar Year End 2018

In an effort to allow adequate time to prepare for future year-end system jar requirements, please be aware that you must have the following System JARs loaded before the Calendar Year End 2018 release which is scheduled for December 2018. *Appropriate action should be taken throughout the next months to plan for this System JAR requirement.*

Anticipated Calendar Year End 2018 System JAR Requirements

- Costpoint 7.0.1: System JAR 049 (released April 2017)
- Costpoint 7.1.1: System JAR 028 (released April 2017)

Both System JARs introduced a much needed change to the State Filing Statuses in Costpoint. Rather than using filing statuses that only applied to Costpoint (Both, Miscellaneous 1, Miscellaneous 2, etc.) and had to be manually mapped to each state's actual filing statuses, Costpoint 7.0.1 and 7.1.1 have been updated to use each state's actual filing status(es). Though the new filing statuses were introduced April 2017, Deltek will continue to support tax table updates based on the original state filing statuses for the remaining 2018 tax updates. Any tax updates for 2019 will only support the new state filing statuses that were introduced in System JAR 049 for 7.0.1 and System JAR 028 for 7.1.1 (both released in April 2017).

Version 7.1.1 – Further Reductions in the Need to Release Regulatory Updates within System JARs

We are happy to announce that we have made several programming changes within the past year to limit the need for regulatory changes to be released via System JAR. System JAR 028 for Costpoint 7.1.1 was part of that effort.

The coding changes introduced in System JAR 028 for Costpoint 7.1.1 allowed us to disassociate payroll computation coding changes from future 7.1.1 System JAR releases. So, after System JAR 028, changes to Costpoint version 7.1.1's Compute Payroll application will not require deployment via System JAR as they did in the past. This not only means that we can deploy Costpoint 7.1.1 regulatory updates and fixes more quickly, but it will also help us keep the System JAR requirements for Calendar Year End releases as minimal as possible.

The changes we made with the noted System JARs will greatly help with that effort to minimize the System JAR requirements for future regulatory releases.

Materials Management

Organization Security – Procurement Planning

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Procurement Planning module. This feature ensures that correct organizational security is applied when a user enters an inventory abbreviation in which the linked project and/or organization are not authorized for the logged-in user/ID.

System JAR Requirements

This enhancement requires the Costpoint 7.1.1 System JAR 038 (cp711_sys_038.zip)

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
Materials	PP	Manage Simple Purchase Requisitions	PPMQREQ	cp711_cmnlib_PPMENTRQ_013.zip cp711_ppmqreq_013.zip

Domain	Module	Application ID	Application Name	Application File
Materials	PP	Manage Purchase Requisitions	PPMNTRQ1	cp711_cmnlib_PPMENTRQ_013.zip
Materials	PP	Apply PO Info to Purchase Requisitions	PPMNTRQ2	cp711_cmnlib_PPMENTRQ_013.zip
Materials	PP	Apply PO Info to Purchase Requisitions by Line	PPMRQLN	cp711_cmnlib_PPMENTRQ_013.zip cp711_ppmrqln_021.zip
Materials	PP	Approve Purchase Requisitions	PPMRQAPX	cp711_ppmrqapx_016.zip
Materials	PP	Approve Purchase Requisition Lines	PPMRQAPL	cp711_ppmrqapl_012.zip
Materials	PP	Print Purchase Requisitions	PPRPRRQ	cp711_pprprrq_006.zip
Materials	PP	View Purchase Requisition Status	PPQRQSTS	cp711_ppqrqsts_011.zip
Materials	PP	Assign Purchase Requisition Lines to Buyers	PPMBUYAL	cp711_ppmbuyal_008.zip
Materials	PP	Assign Purchase Requisitions to Buyers	PPMBUYAS	cp711_ppmbuyas_009.zip

Domain	Module	Application ID	Application Name	Application File
Materials	PP	Print Purchase Requisition Approval Status Report	PPRAPPR	cp711_pprappr_003.zip
Materials	PP	Print Purchase Requisition Commitment Report	PPRCOMT	cp711_pprcomt_003.zip

Manage Simple Purchase Requisitions (PPMQREQ)

The following are the changes to this screen:

- Data Entry
  - User access validation has been modified so that if you enter new data with a requisition type that is linked to projects with an owning organization and/or to organizations that are not authorized for the user ID, Costpoint displays an error message.
  - User access validation has been modified so that if you enter new data with a requisitioner's organization that is not authorized for the user ID, Costpoint displays an error message.
  - User access validation has been modified so that if you link a project (on the Charge Numbers subtask) with a Project's Owning Org (PROJ. ORG_ID), and this is not authorized for the user ID and/or an organization, Costpoint displays an error message.
- Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines whether or not the user ID logged in has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
  - User access validation has been modified so that if you enter a requisitioner's organization that is not authorized for the user ID, Costpoint displays an error message.
  - User access validation has been modified so that if you link a project (on the Charge Numbers subtask - Project's Owning Org (PROJ. ORG_ID)) and/or an organization that is not authorized for the user ID, Costpoint displays an error message.
- Lookup
  - Requisition Type – Costpoint now filters and only displays requisition types that are linked to projects with owning organizations that are authorized for the logged-in user ID.
  - Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.

- Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Manage Purchase Requisitions (PPMNTRQ1)

The following are the changes to this screen:

- Data Entry

    - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to add, change, or delete a requisition if your user ID does not have 'Full rights to the requisitioner's org ID in the user security group's security profile.

        On new purchase requisitions, if you enter a requisitioner's org, project (on the Accounting Defaults tab - Project's Owning Org (PROJ. ORG_ID)), and organization (in the Accounting Defaults tab) not authorized for the user ID, Costpoint displays an error message. In addition, if you link a project (on the Accounts subtask - Project's Owning Org (PROJ. ORG_ID)) and an organization (on the Accounts subtask) that are not authorized for the user ID, Costpoint displays an error message.

    - If approval process is required – If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's org ID.

        - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.

        - If none of the users for any of the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.

        - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID and changes will still be saved.

- Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

- Update

    - Costpoint now displays an error message if you update one of the following and your logged-in user ID is not authorized to do so:

        - Requisitioner's Org

        - Project (on the Accounting Defaults tab - Project's Owning Org)

        - Organization (on the Accounting Defaults tab)

        - Project (on the Accounts subtask - Project's Owning Org)

        - Organization (on the Accounts subtask)

    - If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's organization ID.

- Buyer Assignment – Costpoint requires the buyer to be authorized for the requisitioner's organization ID.

- Lookup

- Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.

- Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

The following are the changes to this screen:

- Data Entry

  - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to add, change, or delete a requisition if your user ID does not have 'Full rights to the requisitioner's org ID in the user security group's security profile.

    On new purchase requisitions, if you enter a requisitioner's org, project (on the Accounting Defaults tab - Project's Owning Org (PROJ. ORG_ID)), and organization (in the Accounting Defaults tab) not authorized for the user ID, Costpoint displays an error message. In addition, if you link a project (on the Accounts subtask - Project's Owning Org (PROJ. ORG_ID)) and an organization (on the Accounts subtask) that are not authorized for the user ID, Costpoint displays an error message.

  - If approval process is required – If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's org ID.

    - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.

    - If none of the users for any of the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.

    - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID and changes will still be saved.

- Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

- Update

  - Costpoint now displays an error message if you update one of the following and your logged-in user ID is not authorized to do so:

    - Requisitioner's Org

    - Project (on the Accounting Defaults tab - Project's Owning Org)

    - Organization (on the Accounting Defaults tab)

    - Project (on the Accounts subtask - Project's Owning Org)

    - Organization (on the Accounts subtask)

  - If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's organization ID.

- Buyer Assignment – Costpoint requires the buyer to be authorized for the requisitioner's organization ID.

- Lookup

    - Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.

Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Apply PO Info to Purchase Requisitions by Line (PPMRQLN)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the Requisitioner's Org at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

- Update

    - Costpoint now displays an error message if you update either the project (on the Accounts subtask - Project's Owning Org) or organization (in the Accounts subtask) where the user ID is not authorized.

    - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.

        - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.

        - If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.

        - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.

- Buyer Assignment – Costpoint requires this to be authorized for the requisitioner's organization ID.

- Lookup

    - Organization – Costpoint now filters and only displays organizations that are authorized for the user ID.

    - Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the user ID.

Approve Purchase Requisitions (PPMRQAPX)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the Requisitioner's Org at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

- Update

    - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.

- If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.

- If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.

- If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.

Approve Purchase Requisition Lines (PPMRQAPL)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

- Update

  - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.

    - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.

    - If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.

    - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.

Print Purchase Requisitions (PPRPRRQ)

The following are the changes to this screen:

- Print

  - Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisitioner's organization linked to it.

  - Costpoint displays an error message if you select a specific requisitioner organization that you do not have full rights to.

- Report – Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

  Costpoint will not update the Printed Flag for the requisition that has suppressed data and will consider it as not printed.

View Purchase Requisition Status (PPQRQSTS)

Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Assign Purchase Requisition Lines to Buyers (PPMBUYAL)

Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, whether or not the user logged-in ID has rights to projects' owning orgs and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Costpoint will validate and display an error message if the user ID(s) linked to the Buyer's Employee ID is not authorized for the requisitioner's organization at the header.

Assign Purchase Requisitions to Buyers (PPMBUYAS)

Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning orgs and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Costpoint will validate and display an error message if the user ID(s) linked to the Buyer's Employee ID is not authorized for the requisitioner's organization at the header.

Print Purchase Requisition Approval Status Report (PPRAPPR)

Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisition organization linked to it.

Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

Print Purchase Requisition Commitment (PPRCOMT)

Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisition organization linked to it.

Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

The report will still include the total amounts for the report, including amounts from those requisitions that were suppressed.

Administration

There are no changes to the Administration domain for this release.

Reports & Analytics

Role-Based Dashboards: Usability Enhancements

Role-based dashboards available in Costpoint are continuously being updated to improve usability and the overall of the dashboards.

In this release, the following changes have been implemented:

- The Projects Approaching Funding dashpart has been renamed to Projects Over x% Funding. On the Reports tab, x% dynamically changes, depending on the **Approaching**

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funding % value you selected on the Parameters tab (for example, if you selected 50%, the title becomes Projects Over 50% Funding).

On the chart, the % complete labels now display on the chart bars. In addition, the subtitle "for subperiod ending: mm/dd/yy" has been changed to "subperiod end mm/dd/yy."

▪ The following Aging dashparts have been renamed on both the Parameters and Reports tab to more accurately indicate that the data presented have been outstanding for more than 30 days:

  ▪ AR Aging is now AR Over 30.

  ▪ AP Aging is now AP Over 30.

  ▪ Aged Open Billing Detail is now Open Billing Over 30.

▪ The **Current** bucket label has been changed to **0-30** on the following charts:

  ▪ AR Current

  ▪ AP Current

  ▪ Current Open Billing

▪ The amounts displayed on the following charts are now based on the company's functional currency, as set up in the Costpoint database being accessed. The functional currency is also displayed on the chart legend.

  ▪ AR Current and AR Over 30

  ▪ AP Current and AP Over 30

  ▪ Current Open Billing and Open Billing Over 30

  ▪ Project Over x% Funding

The following dashparts are available on the Project Manager Dashboard, Organization Manager Dashboard, and Finance Manager Dashboard.

  ▪ AR Current and AR Over 30

  ▪ Current Open Billing and Open Billing Over 30

The Projects Over x% Funding dashpart is available on the Project Manager Dashboard and Organization Manager Dashboard.

The AP Current and AP Over 30 dashparts are available only on the Finance Manager Dashboard.

System Jar Requirement

These enhancements require Costpoint 7.1.1 System JAR 028 (cp711_sys_038.zip).

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.

Domain	Module	Application ID	Application Name	Application File
Reporting & Analytics	Dashboards	PJDPM	Project Manager Dashboard	cp711_pjdpm_004.zip

Domain	Module	Application ID	Application Name	Application File
Reporting & Analytics	Dashboards	PJDOM	Organization Manager Dashboard	cp711_pjdom_003.zip
Reporting & Analytics	Dashboards	DBDFM	Finance Manager Dashboard	cp711_dbdfm_003.zip

Known Issues

Discount Amount From Voucher Settings Not Factored in Outstanding Amount on AP Charts

The value of the discount amount (S_POST_DISC_GL_CD) from the Voucher Settings (VCHR_SETTINGS) table is currently not included in the calculation of the outstanding amounts displayed on the AP Current and AP Over 30 charts on the Finance Manager Dashboard.

Drill-Through Application Not Automatically Loading the Result Set

On the Labor Utilization dashpart of the Organization Manager Dashboard, clicking an employee ID link brings up the Utilization Analysis (COL1, BOL1, POL1) screen. This screen, however, does not automatically load the result set for the selected employee ID link. To display the utilization analysis information on this screen, you must click the **Execute** icon on the toolbar or press F3.

Duplicate Tooltips

If you use Internet Explorer, duplicate tooltips may display when you hover over a bar or a bar segment on the following charts:

- **AR Current and AR Over 30 charts** — Available on all three dashboards
- **Current Open Billing and Open Billing Over 30 charts** — Available on all three dashboards
- **AP Current and AP Over 30 charts** — Available only on the Finance Manager Dashboard
- **Projects Over x% Funding chart** — Available only on the Project Manager Dashboard and Organization Manager Dashboard
- **Timesheet Status chart** — Available only on the Organization Manager Dashboard

Incorrect Color Pallete Used for the Current Charts

The color pallete applied to the **0-30** bucket label and bars on the AR Current, AP Current, and Current Open Billing charts is the same as that for the **31-60** day aging bucket on the AR Over 30, AP Over 30, and Open Billing Over 30 charts.

Inconsistent Dashpart Titles

"Projects Over x% Funding" displays on the Parameters tab, while the Reports tab has "Projects Over x% of Funding." The latter will be modified to agree with the title on the Parameters tab.

"Current Open Billing Detail" displays on the Parameters tab, while the Reports tab has "Current Open Billing." The one on the Parameters tab will be updated to remove "Detail" from the title.

Viewing the Online Help

If you use Internet Explorer and the online help does not display correctly, you need to turn off Compatibility View for the browser. Click Tools **»** Compatibility View Settings, and clear the **Display intranet sites in Compatibility View** check box. Then refresh the browser. Make sure you remove deltek.com (if listed) from the websites you have added to the Compatibility View list.

Configuration Screen for Costpoint Enterprise Reporting

The new Manage Reporting Current Period screen has been added in preparation for an upcoming change to Costpoint Enterprise Reporting (CER). This screen would allow the configuration of the current reporting period for CER. There are two Update Modes when the reporting period is set:

- Auto — Select this option to set the current reporting period based on when the system date falls in.

- Manual — Select this option to manually set the current reporting period by entering the **End Date**, **Fiscal Year**, **Period**, and **Subperiod** values on screen.

> Although this screen is already available in the Reports and Analytics domain, it has no impact on the current functionality of CER yet. A future version of CER will be required for this screen to take effect.

System Requirements

This enhancement requires the following:

- cp711_sys_038.zip
- PATCH3324.sql

Application JAR Requirement

Domain	Module	Application ID	Application Name	Application File
Reporting & Analytics	Configuration	BIMRPTCURPD	Maintain Reporting Current Period	cp711_bimrptcurpd_001.zip

Budgeting and Planning

Budgeting Administration

There are no changes to Budgeting Administration for this release.

Time & Expense

Time

There were no updates in this area.

Expense

There were no updates in this area.

Configuration

There were no updates in this area.

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