Deltek Costpoint HotFix Readme

Release Date: July 27, 2017

Approval Workflow Enhancements

Several enhancements have been made to the Approval Workflow (WFA) screens and processes, and a new screen and new subtasks have been created to help you better manage your approval workflows.

The enhancements include, but are not limited, to the following:

- You can now have multiple approval workflow models for a specific application screen. In addition, you can incorporate multiple application screens into a single workflow model.
- You can manage your approval workflow revisions through the **New Revision** button added to the Approval Workflow Models screen for approval workflow models with pending or completed cases.
- An import/export functionality has been added to allow you to import workflow models to an XML definition file and import data from it.
- Approval by clicking an email link without logging in to Costpoint is now available.

More details about these enhancements are included in the following sections.

For additional information on how to configure, design, and run approval workflows, see the *Deltek Costpoint 7.1.1 Approval Workflows: WFA* document or the Costpoint online help.

Approval Workflow Email Messages (WFMAEMAIL)

Use this new screen to define a text template for your approval workflow email notifications. When you open this screen, a read-only message template displays. You can use this default as a template for all your workflows or define your custom templates and assign them to your workflows. To define your own template, you can click **New** or **Copy** on the application toolbar and enter/edit values in the screen fields.

To access this screen, go to **Administration » Workflow » Approval Workflow (NEW) » Approval Workflow Email Messages**.

Approval Workflow Models (WFMAPPRL)

New subtasks and fields have been added to this screen. Some subtasks and fields have been moved to other parts of the screen, and a few fields have been renamed.

Header Section

These are the new UI items added to this section:

- **Revision** — This field displays the revision number of the workflow model.
- **New Revision** — This button is visible and enabled only if there are pending or completed cases for the workflow. Click this button to create a new revision of the workflow model.
- **Test Mode** — Select this check box to set the workflow model in test mode and run test cases. Only inactive workflow models can be set in test mode.
- **Activate/Deactivate** — Click the **Activate/Deactivate** button to activate/deactivate the workflow.
- **Company** — If you have multiple companies, enter the specific company that can use the workflow model. If you leave this field blank, the workflow model will be applicable to all companies.
- **Email Text** — Enter the email text template you want to use for your approval workflow email notifications.

- **Pending or Completed Cases** — This field displays the number of pending or completed cases of the workflow model using a specific instance and revision of the workflow model.
- **Pending or Completed Test Cases** — This field displays the number of pending or completed test cases of the workflow model using a specific instance and revision of the workflow model.

The following, on the other hand, have been removed from the header section:

- **Object of Approval** group box
- **Application** — This field is now on the Application Screens subtask.
- **Result Set (Screen)** — This field is now on the Application Screens subtask.

Relocated Subtasks

The following subtasks have been removed from the main screen and are now under the new Application Screens subtask:

- **Approval Screen Fields** — In addition to being part of the Application Screens subtask, these changes have been made to this subtask:
    - These are the new fields available:
        - **Entity Key Field Name** — Enter the entity key field name you want to map to the approval screen field.

          Since the mapping helps retrieve values for the entity fields from the actual screen fields when the approval starts, it is very important that you map all **Key** fields to entity fields.

        - **Screen Name** — Enter the name of the screen that contains the screen field that is the object of approval.
        - **Result Set (Screen) Id** — Enter the result set ID. If the screen is not the topmost result set of the application, you can still include key fields from the parent result set.
    - The functionality of the **Load All Screen Fields** button has been modified. When you click this button, Costpoint automatically populates the Approval Screen Fields subtask with all fields defined for the application screen. The loaded values, including those for **Screen Name** and **Result (Screen) Id**, cannot be modified. Only the **Entity Key Field Name** field is editable, and values that can be entered or selected in the lookup for this field must be first set up on the Approval Entity Fields subtask.
    - **Field** is now labeled as **Field Id**.
    - The **Column** and **Table** fields have been removed.
- **Conditions** — In addition to being part of the Application Screens subtask, the following changes have been made to this subtask:
    - The **Entity Field** field has been added. Use this field to enter the entity field to which you want to apply a condition.
    - The **Screen Field Name** and **Field ID** fields have been removed.

New Subtasks

These are the new subtasks available on the Approval Workflow Models screen:

- **Approval Entity Fields** — Use this subtask to define entity fields, which are the actual object of approval in the workflow model.
- **Application Screens** — This subtask allows for multiple screens to be associated with the workflow. It contains the Approval Screen Fields and Conditions subtasks, which were previously subtasks of the main screen. Use this subtask to define the application screens associated with the approval workflow model.
- **View Approval Cases** — Use this subtask to view all completed or pending cases (instances) of the approval workflow model.

- **Import/Export** — Use this subtask to export approval workflow models to an XML definition file or import data from it.

Modified Subtasks

These are the updates on the Conditions and Updates subtasks of the Edit Node and Edit Activity subtasks:

- A new field, **Entity Field**, has been added.
- The **Screen Field Name** and **Field ID** fields have been removed.

On the Edit Activity subtask, the following modifications have been made:

- **Activity** has been renamed to **Activity Name**.
- A new group box, **Application Screen**, has been added. This group box has the **Screen Name** field, which displays, by default, the screen name entered and is designated as the start screen on the Application Screens subtask. If you have associated multiple application screens to the workflow model, you can use this field to select the specific screen you want to associate with the activity.

My Approval Tasks (WFATODO)

A new field, **Entity Field Name**, has been added to the Approval Fields table window. This field displays the entity field name associated with the task/step selected on the main screen. In the same table window, the **Key** field has been removed.

Approval by Email (New Functionality)

You can now approve workflow activities through email using any device capable of receiving email messages and has Internet browsing enabled.

The notification message contains two links:

- **Click here to approve** — When you click this link, a default browser displays and the request to approve the activity is initiated without logging in to Costpoint. If the approval is successful, the following message displays: “Workflow Activity has been approved.” If the approval request is invalid, the activity has already been approved, or something went wrong, the following message displays: “Approve Workflow Activity failed.”
- **Click here to open record in Costpoint** — When you click this link, Costpoint opens to the specific application screen and record that is the subject of the approval activity, if single sign-on has been set up for your access. If single sign-on is not enabled, you will be prompted to log in.

System JAR Requirement

These enhancements require Costpoint 7.1.1 System JAR 031 (cp711_sys_031.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 Name	Application ID	Application File
Administration	WF	Approval Workflow Email Messages	WFMAEMAIL	cp711_ wfmaemail_001.zip
Administration	WF	Approval Workflow Models	WFMAPPRL	cp711_wfmapprl_004.zip
Reports & Analytics	DB	My Approval Tasks	WFATODO	cp711_wfatodo_002.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 Customer Care at http://support.deltek.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 Customer Care Connect 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 Customer Care Connect 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).
4. 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 Customer Care at https://support.deltek.com.