Deltek

Deltek Costpoint® 7.1.1

Cumulative Release Notes for August 2018

August 31, 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 in August 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.

Note: Release notes contain summaries of the enhancements made. Refer to the online help for additional details.

Costpoint 7.1.1 Online Help

Platform Changes

Weblogic 12.1.3 and 12.2.1.3 Critical Patch Update

The Costpoint 7.1.1 Framework installer is updated to include support and compatibility for Weblogic 12.1.3 and Weblogic 12.2.1.3 Oracle Critical Patch Update (July 2018). The update aims to address security vulnerabilities.

System Requirements

This enhancement requires the following:

- p27919943_121300_Generic.zip
- p27912627_122130_Generic.zip

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).
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.

More Information:

If you have any questions, please contact Deltek Support Center at https://deltek.custhelp.com

Costpoint

Accounting

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

Contracts

Patch 3511

PATCH3511 has been released in preparation for the future enhancements for the Configure Contract Management Settings screen.

Patch 3467

PATCH3467 has been released in preparation for the future enhancements for the Configure Opportunity Settings screen and for an upcoming new screen in the Contracts domain.

User Options for Project Modification Effective Date: Phase II

Having accurate effective dates in project modifications is important since these dates determine which modifications will be used in determining the amount of funding or contract value to be used in enforcing revenue ceilings. With the system date as a default for effective dates of new modifications, which was the previous functionality, revenue ceilings can be released prematurely if you are entering a future project modification. Although the date that defaults can be edited, users may not notice that the date is incorrect and revenue ceilings could get released incorrectly.

To use more accurate effective dates for modifications when computing revenue, Costpoint now provides you the option to default the system date for effective dates or to leave the effective date field blank so users would be required to complete it.

Screen Updates

Several applications have been modified for this enhancement and rolled out in two releases.
In a previous release, changes to the following screens were included:

- Configure Project Settings (PJMSETNG)
- Manage Modifications (PJMMOD)
- Manage Project User Flow (PJMBASIC)
- Import Project Master Data (PJPPREP)
- Set Up Company (SYPCOMP)

In this Phase II release, other applications with the **Effective Date** field have been updated.

Screens with the Effective Date Field

The **Effective Date** field on these screens now considers the option selected in the **Modifications Effective Date** group box in Configure Project Settings:

- Manage Contracts (CTMCNTR), on the Modifications tab
- Manage Subcontracts (CTMSBCNTR), on the Modifications tab
- Manage Alternate Project Revenue Profiles (PJMALTPJ), on the Modifications subtask

- Manage Project Revenue Calculation Value History (PJMALTHS), on the Modifications subtask

Note: If Default System Date is selected on the Configure Project Settings screen, check that the date that defaults is applicable to new project modifications to avoid revenue ceilings being released incorrectly.

If User Must Enter Date is selected, make sure to enter a value in Effective Date before saving the record to avoid an error.

System Requirements

This enhancement requires the following files.

Note: The updates made to the applications in this release depend on the new setting added to the Configure Project Settings screen. To enable the full functionality of these updates, you must install the following files, which were made available in a previous release.

- Costpoint 7.1.1 System JAR 044 (cp711_sys_044.zip)
- PATCH3499

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	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_008.zip
Contracts	Contracts	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_009.zip
Projects	Project Setup	PJMALTHS	Manage Project Revenue Calculation Value History	cp711_pjmalths_003.zip
Projects	Project Setup	PJMALTPJ	Manage Alternate Project Revenue Profiles	cp711_pjmaltpj_006.zip

Contract Management Reporting: Opportunity

Changes to the following applications have been rolled out in preparation for the future release of the new opportunity reporting screens in the Contracts domain:

- **Manage Opportunities** — A new check box, **Exclude from Reports**, has been added to this screen to allow you to indicate which opportunity records should be excluded from reports in the Contracts domain. This is important when you need to generate reports and exclude certain types of opportunities (for example, indefinite delivery/indefinite quantity and blanket purchase agreement opportunities) to avoid overstating the reports.

This application has also been modified to update the new Opportunity Audit table, OPP_VALUE_AUDIT, which captures data from the Manage Opportunities screen as changes are made to certain fields. The values in the audit tables will be used within trending reports within Costpoint Enterprise Reporting.

- **Manage Opportunity Stages** — The following columns are now available on this screen to help you filter and group opportunity stages for reporting purposes:
  - **Grouped Stage Name** — Enter the grouped stage name for reporting on opportunities.
  - **Include in Current Pipeline** — Select this check box to include the opportunity stage in the current pipeline.
  - **Win / Loss** — Select the option where the opportunity stage should be included in pipeline reports and analytics. Valid values are Win, Loss, and NA, with NA as the default value.

System Requirements

This enhancement requires the following:

- PATCH3466
- PATCH3478

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	CTMOPP	Manage Opportunities	cp711_ctmopp_009.zip
Contracts	Contract Management Controls	CTMSTAGE	Manage Opportunity Stages	cp711_ctmstage_003.zip

FAR and DFARS Updates

Enhancements have been made to the Manage DFARS Library screen to enable you to track other supplemental regulation clauses/provisions in addition to Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) clauses/provisions, and associate these clauses/provisions to contracts and subcontracts. Some subtasks on the Manage Contracts and Manage Subcontracts screens have also been updated with additional fields that can provide adequate information about the clauses/provisions that apply to contracts and subcontracts. This information can help you determine whether you have the correct version of the clause or provision.

Screen Updates

Manage Supplemental Regulations Library (CTMDFAR)

Previously named Manage DFARS Library, this screen is now labeled as Manage Supplemental Regulations Library to cover clauses from both DFARS and other agencies.

A new column, **Agency**, is added to this screen, which you can use to enter the agency who issued the supplemental regulatory clause. The **DFARS Clause Number** column has also been renamed to **Clause Number**.

Manage Contracts (CTMCNTR)

The following fields are now available on the FAR Clauses/Provisions subtask:

- **Description from Contract** — Enter the FAR clause/provision description from the contract.
- **Page No** — Enter the page number where the FAR clause/provision is located within the contract.
- **Effective Date** — Enter, or use calendar to select, the effective date of the FAR clause/provision.

These are the changes to the Supplemental Regulations subtask:

- Previously labeled as DFARS Clauses, this subtask is now named Supplemental Regulations to cover clauses from both DFARS and other agencies.
- The following fields have been renamed:
  - From **Copy DFARS Clauses from** to **Copy Supplemental Regulations from**
  - From **DFARS Clauses** to **Supplemental Regulations**
  - From **DFARS Clause Number** to **Clause Number**
- The new fields on this subtask include:
  - **Agency** — Enter, or use lookup to select, the agency who issued the supplemental regulatory clause.
  - **Description from Contract** — Enter the supplemental regulatory clause description from the contract.
  - **Page No** — Enter the page number where the supplemental regulatory clause is located within the contract.
  - **Effective Date** — Enter, or use calendar to select, the effective date of the supplemental regulatory clause.

Manage Subcontracts (CTMSBCNTR)

The following fields are now available on the FAR Clauses/Provisions subtask:

- **Send to PO** — Select this check box if the FAR clause/provision should flow to the purchase order associated with the subcontract.
- **Description from Contract** — Enter the FAR clause/provision description from the contract.
- **Page No** — Enter the page number where the FAR clause/provision is located within the contract.
- **Effective Date** — Enter, or use calendar to select, the effective date of the FAR clause/provision.

These are the changes to the Supplemental Regulations subtask:

- Previously labeled as DFARS Clauses, this subtask is now named Supplemental Regulations to cover clauses from both DFARS and other agencies.
- The following fields have been renamed:
  - From **Copy DFARS Clauses from** to **Copy Supplemental Regulations from**
  - From **DFARS Clauses** to **Supplemental Regulations**
  - From **DFARS Clause Number** to **Clause Number**
- The new fields on this subtask include:
  - **Send to PO** — Select this check box if the regulatory clause should flow to the purchase order associated with the subcontract.
  - **Agency** — Enter, or use lookup to select, the agency who issued the supplemental regulatory clause.
  - **Description from Contract** — Enter the supplemental regulatory clause description from the contract.
  - **Page No** — Enter the page number where the supplemental regulatory clause is located within the contract.
  - **Effective Date** — Enter, or use calendar to select, the effective date of the supplemental regulatory clause.

System Requirements

This enhancement requires the following:

- PATCH3466
- PATCH3497
- PATCH3499
- PATCH3513

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	CTMDFAR	Manage Supplemental Regulations Library	cp711_ctmdfar_003.zip
Contracts	Contract Management Controls	CTMAGENC	Manage Agencies	cp711_ctmagenc_002.zip
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_008.zip

Domain	Module	Application ID	Application Name	Application File
Contracts	Contracts	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_009.zip

Viewing Additional Reports in the Contracts Domain

Some changes have been made available on the following screens in preparation for future enhancements in the Contracts domain:

- Configure Opportunity Settings
  - Addition of parameter settings so that **Project Labor Summary Report** and **Project Non-Labor Detail Report** can be run from Manage Opportunities
- Manage Opportunities
  - Addition of **Project Labor Summary Report** and **Project Non-Labor Detail Report** to the **Print** and **Preview** menu selections on the Projects Linked subtask
  - Change of subtask name from Opportunity Teammates to Opportunity Teammates/Competitors
  - Change of field name from **Prime/Subcontractor** to **Teammate/Competitor**, and addition of **Competitor** to the drop-down list
- Manage Contracts
  - Addition of **Project Labor Summary Report** and **Project Non-Labor Detail Report** to the **Print** and **Preview** menu selections on the Projects Linked subtask
- Manage Subcontracts
  - Addition of Project Labor Summary Report and Project Non-Labor Detail Report to the Print and Preview menu selections on the General tab

Note: Although these changes are already available on the screens, they have no impact on the current functionality yet. A future version of Costpoint will be required for these fields to take effect.

Projects

User Options for Project Modification Effective Date: Phase I

Having accurate effective dates in project modifications is important since these dates determine which modifications will be used in determining the amount of funding or contract value to be used in enforcing revenue ceilings. With the system date as a default for effective dates of new modifications, which was the previous functionality, revenue ceilings can be released prematurely if you are entering a future project modification. Although the date that defaults can be edited, users may not notice that the date is incorrect and revenue ceilings could get released incorrectly.

To use more accurate effective dates for modifications when computing revenue, Costpoint now provides you the option to default the system date for effective dates or to leave the effective date field blank so users would be required to complete it.

Screen Updates

Several applications have been modified for this enhancement and will be rolled out in two releases.

In this Phase I release, the following applications have been updated.

Configure Project Settings (PJMSETNG)

The new **Modifications Effective Date** group box added to this screen contains the following fields:

- **Default System Date** — Select this option to have Costpoint use the system date as a default for the effective date of new project modifications. The date that defaults can still be changed when you select this option.
- **User Must Enter Date** — Select this option to require the user to enter the effective date when entering new project modifications. No date defaults when you select this option, and the user must enter a date before he/she can save the modification record.

Manage Modifications (PJMMOD) and Manage Project User Flow (PJMBASIC)

The **Effective Date** field on these screens now considers the option selected in the **Modifications Effective Date** group box in Configure Project Settings:

- Manage Modifications (PJMMOD), in the Modifications group box
- Manage Project User Flow (PJMBASIC), on the Modifications subtask

> **Note:** If **Default System Date** is selected on the Configure Project Settings screen, check that the date that defaults is applicable to new project modifications to avoid revenue ceilings being released incorrectly.
>
> If **User Must Enter Date** is selected, make sure to enter a value in **Effective Date** before saving the record to avoid an error.

Import Project Master Data (PJPPREP)

This application has been updated to consider the option selected in the **Modifications Effective Date** group box in Configure Project Settings when importing project modifications. It uses the following logic:

- If **Default System Date** is selected and there is no **Effective Date** value (EFFECT_DT column in the PROJ_MOD table) in the input file, the system date defaults into the modification effective date when project modifications are imported.
- If **Default System Date** is selected and an **Effective Date** value has been entered in the input file, Costpoint uses the input file effective date when project modifications are imported. The system does not overwrite this date with the current date.
- If **User Must Enter Date** is selected, the input file must have an **Effective Date** value before it can be imported. If Effective Date is left blank, an error will be indicated in the Import Project Information Error Report.

Set Up Company (SYPCOMP)

Set Up Company has been modified to include the selection made in the **Modifications Effective Date** group box in Configure Project Settings when copying settings from one company to another.

System Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 044 (cp711_sys_044.zip)
- PATCH3499

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	Project Setup	PJMBASIC	Manage Project User Flow	cp711_pjmbasic_029.zip
Projects	Project Setup	PJMMOD	Manage Modifications	cp711_pjmmod_004.zip
Projects	Project Setup	PJMSETNG	Configure Project Settings	cp711_pjmsetng_011.zip
Projects	Project Setup	PJPPREP	Import Project Master Data	cp711_pjpprep_023.zip
Admin	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_022.zip

Add Subcontract ID to Project Modifications

Costpoint now gives you the ability to add subcontract IDs to project modifications so that you can see project modifications entered by finance on your subcontracts. Several updates have been made on the following screens for this enhancement.

Screen Updates

Manage Modifications (PJMMOD)

Changes to the **Subcontract ID** field includes the following:

- Previously named Subcontract, this field is now labeled Subcontract ID.
- Previously under **Identification**, the **Subcontract ID** field along with the **Subcontract Name** field are now in the **Modifications** group box.
- If you are licensed for Contract Management:
  - This field is enabled if the **Subcontract Modification ID** field is blank. You can enter or use lookup to select a subcontract ID from a subcontract record created in the Contracts domain. Once you enter a subcontract ID for the project modification and save the record, this project modification becomes visible for the subcontract ID on the Manage Subcontracts screen.
  - This field is disabled if the **Subcontract Modification ID** field is not blank, and you will not be able to enter or modify the subcontract ID.

> **Note:** The **Subcontract Modification ID** field is visible only if you are licensed for Contract Management.

- If you are not licensed for Contract Management, you can enter a subcontract ID in this field, but this will not be validated by the system.

Several other updates have been made to this screen, as follows:

- The **Contract** field is now labeled **Contract ID** and has also been moved, together with the **Contract Name** field, to the **Modifications** group box.
- If a contract ID exists for the project entered on this screen, that contract ID defaults in the **Contract ID** field upon tabbing out of the **Project** field. Previously, the contract ID displays only after saving the record.
- The **Contract ID**, **Contract Name**, **Subcontract ID**, and **Subcontract Name** fields are now visible whether or not you are licensed for Contract Management.

> **Note:** The Contract Modification ID and Subcontract Modification ID fields remain hidden if you are not licensed for Contract Management.

Manage Project User Flow (PJMBASIC)

The Modifications subtask of Manage Project User Flow now has the following fields:

- Contract ID
- Contract Name
- Subcontract ID
- Subcontract Name

The Subcontract ID field on this subtask follows the same logic as the Subcontract ID field on the Manage Modifications screen:

- If you are licensed for Contract Management:
  - This field is enabled if the Subcontract Modification ID field is blank. You can enter or use lookup to select a subcontract ID from a subcontract record created in the Contracts domain. Once you enter a subcontract ID for the project modification and save the record, this project modification becomes visible for the subcontract ID on the Manage Subcontracts screen.
  - This field is disabled if the Subcontract Modification ID field is not blank, and you will not be able to enter or modify the subcontract ID.

> **Note:** The **Subcontract Modification ID** field is visible only if you are licensed for Contract Management.

- If you are not licensed for Contract Management, you can enter a subcontract ID in this field, but this will not be validated by the system.

For the **Contract ID**, if a contract ID exists for the project entered in the **Identification** group box of this screen, that contract ID defaults in the **Contract ID** field on the Modifications subtask upon tabbing out of the **Project** field. Previously, the contract ID displays only after saving the record.

Import Project Master Data (PJMMOD)

A new column, SUBCNTR_ID, has been added to the PROJ_MOD table.

If the user is licensed for Contract Management, the value that populates this column must exist in Manage Subcontracts (SUBCNTR_ID column in the SUBCNTR_MASTER table). When the subcontract

ID is imported from SUBCNTR_MASTER, the project modification linked to that subcontract ID becomes visible on the Manage Subcontracts screen but remains in PROJ_MOD.

If the user is not licensed for Contract Management, the value in this column is not validated.

System Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 044 (cp711_sys_044.zip)
- cp711_cmnlib_PJMODLIB_001.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
Projects	Project Setup	PJMBASIC	Manage Project User Flow	cp711_pjmbasic_029.zip
Projects	Project Setup	PJMMOD	Manage Modifications	cp711_pjmmod_004.zip
Projects	Project Setup	PJPPREP	Import Project Master Data	cp711_pjpprep_023.zip

PJGOVTLIB and PJMODLIB Libraries

The PJGOVTLIB library contains common business logic, which is shared by the following applications:

- Manage Government Contract Information (PJMGOVT)
- Manage Project User Flow (PJMBASIC)

The PJMODLIB library contains common business logic, which is shared by the following applications:

- Manage Alternate Projects (PJMALTRP)
- Manage Contracts (CTMCNTR)
- Manage Modifications (PJMMOD)
- Manage Project User Flow (PJMBASIC)
- Manage Subcontracts (CTMSBCNTR)

System Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 044 (cp711_sys_044.zip)
- cp711_cmnlib_PJGOVTLIB_001.zip
- cp711_cmnlib_PJMODLIB_001.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
Projects	Project Setup	PJMGOVT	Manage Government Contract Information	cp711_pjmgovt_003.zip

Include Variance Amounts in the Statement of Indirect Expenses

A new **Variance** column has been added to the Statement of Indirect Expenses (SIE) so you can know the difference between actual and budgeted amounts and determine where you are missing budgeted numbers that could account for a higher than expected indirect rate. **Variance** amount is calculated as **Budget** amount – **Actual** amount.

To display this column, you must select the new **Show Variance Column** check box on the Compute/Print Pool Rates screen and select from the following options:

- **Current Period** — Select this option to display variance amounts in the current period. When you select this option, the Variance column is displayed under Current Period on the SIE, together with the Actual and Budget columns.
- **Year To Date** — Select this option to display year-to-date variance amounts. When you select this option, the Variance column is displayed under Year To Date on the SIE, together with the Actual and Budget columns.

Note: The Year To Date Budget column is hidden when you select Current Period, and the Current Period Budget column is hidden when you select Year To Date.

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	PJPCOMPP	Compute/Print Pool Rates	cp711_pjpcompp_007.zip

People

Costpoint Team Management Phase II

This Costpoint Team Management module enhancement moves the Team Management setting from the Configure Personnel Settings screen to a new application, Configure Team Management Settings. The

Team Management settings allow you to specify if managers will be able to view the records of direct reports only, or of both direct and indirect reports, in Team Management applications. All applications in Team Management will reference the setting in the Configure Team Management Settings screen.

Note: This Costpoint release only includes the functionality to specify if managers can view direct/indirect reports in Team Management applications. The additional features mentioned in the updates for Configure Team Management Settings screen will be available in the Phase III release of Team Management enhancements.

Screen Updates

Address (HTMADDRESS)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Citizenship (HTMCITIZENSHIP)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Company Property (HTMPROPERTY)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Configure Team Management Settings (HTMSETTINGS)

The Configure Team Management Settings screen will allow you to set up different options in the Team Management module. You will now use this screen to specify if managers can only view data for just their direct reports or if they can view data for both direct and indirect reports.

Change Options Subtask

Warning: The settings in the Change Options subtask of the Configure Team Management Settings screen are not yet available in this release (Phase II). This subtask will be fully functional in the Phase III release of Team Management enhancements.

The Configure Team Management Settings screen contains a Change Options subtask that provides the following additional options for the Company Property, Phone/Email, Emergency Contacts, and Address applications:

- **Require HR Approval for Changes** — This check box allows you to specify if HR approval is required for any change requests or changes made to an employee record by a manager (change/add/delete). If approval is required, any change requests generated from that application will be saved to a holding table instead of being inserted into the actual Employee table. If HR approval is not required, no change request will be created, the change will instead be saved directly to the appropriate Employee table.
- **Email HR Manager upon Change** — This check box allows you to generate email notifications to an HR manager if a change occurred in an application. Companies that use Costpoint Personnel module can either select to email the appropriate HR manager for the employee or use

a default email address. Companies that do not use Costpoint Personnel module will only have the default option available to them.

- **HR Email Method** — This field allows you to specify how HR Administrators will be notified by email. This field is only available if you select the Email HR Manager upon Change check box.
- **Default HR Email Address** — This field allows you to specify a default email address for the HR representative. This email address will be sent an email if a manager makes a change to an employee record. This field is only available if you select Default Email in the HR Email Method drop-down list.
- **Email Manager upon Approval/Rejection** — This setting sends an email the manager who initiated the change request when the HR manager either approves or rejects the change request. Currently all email messages in the notifications (both HR manager and change request manager) are generic system messages. In the future, we may want to consider allowing users to customize those messages in the configuration application.
- **Warning:** The settings in the Change Options subtask of the Configure Team Management Settings screen are **not** yet available in this release (Phase II). This subtask will be fully functional in the Phase III release of Team Management enhancements.

Configure Personnel Settings (HPMSET)

The Team Management setting, which allows you to specify if managers can view direct reports only, or both direct and indirect reports, is no longer available on this screen. The setting moved to the new Configure Team Management Settings screen which contains settings specifically for Team Management module.

The screen also contains the following changes:

- The Managers, Accident Claims, and Required Forms Upload group boxes were removed.
- The following options will longer be available in a group box:
  - Manager Defaulting Method
  - Accident Claim Numbering Method
  - Required Forms File Type
- The Required Forms File Type label replaces the Required Forms Update group box.
- The Training group box and Default Job Title Validation Method options were removed.
- The **By Company-Wide Organization** option label was corrected.
- The option label changed from “Claim Numbering Method” to “Accident Claim Numbering Method.”
- The check box title changed from “Require Org ID” to “Require Organization ID (Talent Management).”

Emergency Contacts (HTMEMERGENCYCONTACT)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Government Documents (HTMGOVDOCUMENTS)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Knowledge (HTMKNOWLEDGE)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports; or direct and indirect reports.

Leave (HTMLEAVE)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Life Events (HTMLIFEEVENTS)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Phone/Email (HTMPHONE)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Set Up Company (SYPCOMP)

The new field from Configure Team Management Settings screen, Team Management view reports method, was added into company defaults.

Team Details (HTMDETAIL)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Team Information Report (HTRTEAMINFO)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Total Compensation and Benefits (HTMTOTALCOMP)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

System Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 044

- PATCH3484

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
People	Team Management	HTMADDRESS	Address	cp711_htmaddress_002.zip
People	Team Management	HTMCITIZENSHIP	Citizenship	cp711_htmcitizenship_002.zip
People	Team Management	HTMPROPERTY	Company Property	cp711_htmproperty_002.zip
People	Team Management	HTMSETTINGS	Configure Team Management Settings	cp711_htmsettings_001.zip
People	Team Management	HPMSET	Configure Personnel Settings	cp711_hpmset_004.zip
People	Team Management	HTMEMERGENCYCONTACT	Emergency Contacts	cp711_htmemergencycontact_002.zip
People	Team Management	HTMGOVDOCUMENTS	Government Documents	cp711_htmgovdocuments_002.zip
People	Team Management	HTMKNOWLEDGE	Knowledge	cp711_htmknowledge_002.zip
People	Team Management	HTMLEAVE	Leave	cp711_htmleave_002.zip
People	Team Management	HTMLIFEEVENTS	Life Events	cp711_htmlifeevents_002.zip
People	Team Management	HTMPHONE	Phone/Email	cp711_htmphone_002.zip
People	Team Management	SYPCOMP	Set Up Company	cp711_sypcomp_022.zip
People	Team Management	HTMDETAIL	Team Details	cp711_htmdetail_002.zip

Domain	Module	Application ID	Application Name	Application File
People	Team Management	HTMTEAMINFO	Team Information Report	cp711_htmteaminfo_002.zip
People	Team Management	HTMTOTALCOMP	Total Compensation and Benefits	cp711_htmtotalcomp_002.zip

Use Format 3 for Employee History File Exports to Deltek Time and Expense 10+

This Costpoint release updates the Export Data to Deltek Time and Expense (LDPDTC) screen to use version 3 format when exporting Employee History information to Deltek Time & Expense version 10.x+ or greater.

Prior to this release, when exporting Employee History data, the application used the version 2 format for employee records, and the version 3 format for subcontractor records. With this enhancement, the application will use the version 3 format for both employee and subcontractor records in the Employee History file.

> **Note:** Deltek Time and Expense can process an Employee History file with employee records that use the version 2 format and subcontractor records that use the version 3 format. However, if you export both employee and subcontractor records to Deltek Time and Expense, Deltek recommends that you apply this enhancement so that the same format will be used for both types of records.

When generating the Employee History file, the Export Data to Deltek Time and Expense screen performs the following if the login company uses Time & Expense 10.x+ (or greater) as the Deltek Time and Expense version in the Corporate Labor Settings subtask of the Configure Labor Settings screen:

- Populate Field 1 (Format Version) of the employee EMPL_HISTORY records with “3”
- Populate the following fields of the employee EMPL_HISTORY records with a NULL value:
  - Field 25 (Default UDT11)
  - Field 26 (Default UDT12)
  - Field 27 (Default UDT13)
  - Field 28 (Default UDT14)
  - Field 29 (Default UDT15)

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
People	Payroll	LDPDTC	Export Data to Deltek and Expense	cp711_ldpdtc_019.zip

Regulatory and Compliance

IMPORTANT NOTES

Warning: Unless specifically noted in the release notes, any future federal and state tax table changes (not just Colorado) will require the following:

System JAR 054 for Costpoint version 7.0.1

System JAR 028 for Costpoint version 7.1.1

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 054 (to be released June 2018)
- Costpoint 7.1.1: System JAR 028 (released April 2017)

Notes:

System JAR 054 for Costpoint 7.0.1 introduced an update to the Colorado state tax withholding tables. In response to the federal tax code overhaul (Pub. L. 115-97), the Colorado Department of Revenue announced an update to their Allowance table on April 2, 2018 (effective April 1, 2018). This required an update to Costpoint Compute Payroll, which can only be released through a System JAR in Costpoint version 7.0.1.

System JAR 049 for Costpoint 7.0.1 and **System JAR 028 for Costpoint 7.1.1** 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 in 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 means that we can deploy Costpoint 7.1.1 regulatory updates and fixes more quickly, and 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.

2018 Oregon W-2 Electronic Filing

The new statewide transit tax for the State of Oregon, which took effect on July 1, 2018, must be reported in the RS and RV records of the State's W-2 file. In order to track the new tax, this release adds a new **Transit Tax** option to the **Tax Type** drop-down list on the Manage Local Taxes screen.

When you set up the statewide transit tax for Oregon (State is **Oregon** and **Tax Type** is **Transit Tax**), then the local taxable wages and local tax withheld will be reported as the state taxable wages for statewide transit tax and statewide transit tax withheld, respectively, in the following records of Oregon's W-2 file:

RS Record

- **Positions 348-358:** Taxable wages for the statewide transit tax. Deductions that can be applied to wages for income tax withholding generally cannot be applied to wages subject to the transit tax.
- **Positions 359-369:** Amount withheld for the statewide transit tax.

RV Record

- **Positions 40-54:** Total amount of taxable wages for the transit tax.
- **Positions 55-69:** Total amount of statewide transit tax withheld.

Warning: This Costpoint release only updates the Manage Local Taxes screen to allow you to track the new state transit tax. The updated Create State W-2 File screen which will include the new state transit tax in Oregon's W-2 file will be released separately.

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
People	Payroll	PRMLTI	Manage Local Taxes	cp711_prmlti_008.zip

2018 New Jersey Withholding Tax

The State of New Jersey issued updated withholding tables, effective September 1, 2018, which implements a new withholding rate of 15.6 percent for incomes of at least $5 million regardless of the taxpayer's filing status. This release adds new records for New Jersey in the following screens so that the taxes of this State will be calculated accurately in Costpoint Payroll:

- Manage State Tax Withholding Adjustments
- Manage State Standard Deductions

- Manage State Tax Tables

System Requirements

This enhancement requires Costpoint 7.1.1 PATCH3505.

2018 Maryland Withholding Tax

The State of Maryland released a revised withholding guide which reflects changes to the state's standard deduction for the 2018 tax year. Maryland's maximum standard deduction increases from $2,000 to **$2,250**.

Costpoint will be using the new maximum standard deduction amount for Maryland payroll. In order to accomplish this, this Costpoint release adds new records, effective July 1, 2018, for Maryland in the Manage State Standard Deductions and Manage Local Standard Deductions screens.

> **Attention:** For more information, please refer to the *Maryland Employer Withholding Guide*: http://forms.marylandtaxes.gov/current_forms/Withholding_Guide.pdf.

System Requirements

This enhancement requires Costpoint 7.1.1 PATCH3518.

Materials Management

Organizational Security – Sales Order Entry

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Materials domain, specifically in the Sales Order Entry module. This feature ensures that correct user access is applied to the logged-in user ID in accessing inventory transactions by validating and filtering records/transactions as authorized for the user ID.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 044 (cp711_sys_044.zip)
- PATCH3489
- PATCH5122

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 Name	Application ID	Application Files
Materials	OE	Manage Sales Order Entry	OEMNTSO1	cp711_oemntso1_003.zip

Domain	Module	Application Name	Application ID	Application Files
Materials	OE	Manage Sales Order Supervisor Screen	OEMNTSO2	cp711_oemntso2_003.zip
Materials	OE	Approve Sales Order	OEMAPPSO	cp711_oemappso_010.zip
Materials	OE	Print Sales Order Acknowledgements	OERACKN	cp711_oerackn_006.zip
Materials	OE	Manage Sales Order User-Defined Information	OEMSOUDI	cp711_oemsoudi_003.zip
Materials	OE	Create Purchase Requisitions from Sales Orders	OEPGRQ	cp711_oepgrq_011.zip
Materials	OE	Print Sales Order Pick List	OERPICK	cp711_oerpick_006.zip
Materials	OE	Manage Sales Order Inventory Issues	OEMISSU1	cp711_oemissu1_002.zip
Materials	OE	Manage Sales Order Non-Inventory Issues	OEMISSU2	cp711_oemissu2_002.zip
Materials	OE	Manage Shipping Transactions	OEMSHIP	cp711_oemship_014.zip
Materials	OE	Print Packing Slips	OERPCKSL	cp711_oerpcksl_007.zip
Materials	OE	Print DD250 Packing Slips	OER250PS	cp711_oer250ps_006.zip
Materials	OE	Print WA250 Packing Slips	OERW250P	cp711_oerw250p_002.zip
Materials	OE	Print Sales Order Approval Status Report	OERAPPR	cp711_oerappr_003.zip
Materials	OE	Print Sales Order Backlog Report	OERBLOG	cp711_oerblog_003.zip
Materials	OE	View Sales Analysis Information	OEQSALES	cp711_oeqsales_008.zip
Materials	OE	Create RFID Print File	OEPRFID	cp711_oeprfid_003.zip

Domain	Module	Application Name	Application ID	Application Files
Materials	OE	View Sales Order Status Information	OEQSTAT	cp711_oeqstat_009.zip
Materials	OE	Import Sales Order	AOPSOPP	cp711_aopsopp_012.zip
Materials	OE	Load Organization IDs	OEPLDORG	cp711_oepldorg_001.zip
Materials	IN	Load Organization IDs	INPLDORG	cp711_inpldorg_002.zip
Materials	IN	Create Inventory Allocations	INPALLOC	cp711_inpalloc_005.zip

Administration Domain

This section includes summaries of the changes made in relation with the Organization Security feature within the Costpoint Administration domain.

View Help About (SYMABOUT)

The Features subtask on the View Help About (SYMABOUT) screen now includes the Organization Security feature for the Sales Order Entry module.

Materials Domain

This section includes summaries of changes made in relation with the Organization Security feature within the Costpoint Materials domain.

Manage Sales Orders (OEMNTSO1)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization of the organization ID (new). In addition, Costpoint will not display sales orders where organization are left blank.
- Lookup
  - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.
  - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID.
  - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations (standard material) with organizations, and project (owning organization) authorized for the logged-in user ID.
  - Document — Costpoint now narrows the search and displays only documents that are linked to organizations authorized for the logged-in user ID. Costpoint also displays documents that are not linked to any organization.

- A new field, **Organization**, has been to the screen. Use this field to enter an organization ID for the sales order. This field is required if the Organization Security feature is enabled.
- Costpoint now validates your selected/entered entries in several fields against your logged-in user ID's organization and project's owning organization rights.
- Approval Process (when approval process is enabled and you submit sales orders (SO) for approval) — IF you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the organization ID.
  - If none of the users for any of the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays an error message.
  - If at least one of the users for the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays a warning message.

Manage Sales Order Supervisor Screen (OEMNTSO2)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the organization ID (new). In addition, Costpoint will not display sales orders where organizations are left blank.
- Lookup
  - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID
  - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID.
  - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations (standard material) with organizations, and projects (owning organization) authorized for the logged-in user ID.
  - Document — Costpoint now narrows the search and displays only documents that are linked to organizations authorized for the logged-in user ID. Costpoint also displays documents that are not linked to any organization.
- A new field, **Organization**, has been added to the screen. Use this field to enter an organization ID for the sales order. This field is required if the Organization Security feature is enabled.
- Costpoint now validates your selected/entered entries in several fields against your logged-in user ID's organization and project's owning organization rights.
- Approval Process (when approval process is enabled and you submit sales orders for approval) — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the organization ID.
  - If none of the users for any of the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays an error message.
  - If at least one of the users for the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays a warning message.

Approve Sales Orders (OEMAPPSO)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the new organization ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights.
- Approval Process (when approval process is enabled and you submit sales orders for approval) — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the organization ID.
  - If none of the users for any of the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays an error message.
  - If at least one of the users for the approval titles in the approval process is authorized for the organization ID (new), Costpoint displays a warning message.

Print Sales Order Acknowledgments (OERACKN)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Print/Preview**, Costpoint displays all records where you have full rights to the organization.
- When you select **Flag SO Acknowledgment as Printed**, Costpoint only updates record flags where you have full rights to the organization.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the sales order organization, and the following message is printed: "Sales Acknowledgment not printed. Your user ID is not authorized for the Organization on this Sales Order."

Manage Sales Order User-Defined Information (OEMSOUDI)

Costpoint now finds and filters existing sales order records based on your logged-in user ID's organization rights for the new organization ID. In addition, Costpoint will not display sales orders where organizations are left blank.

Create Purchase Requisitions from Sales Orders (OEPGRQ)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization and requisitioner's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Execute**, Costpoint will only display and process records where you have full rights to the organization.

- Approval Process — If organization security is enabled in the system settings, and the screen is activated for organization security, Costpoint will not allow you to enter or select an SO if your user ID is not authorized for the requisitioner's organization linked to the SO.
    - If none of the users for any of the approval titles in the approval process is authorized for the requisitioner's organization, Costpoint generates the requisition but the approval process code is left blank, and status is set to **Pending**.
    - If at least one of the users for the approval titles in the approval process is authorized for the requisition organization, Costpoint generates requisitions with Approval and In-Approval status.
- When your logged-in user ID is not authorized for the organization linked to the SO which you created a requisition for, Costpoint prints a report with the following error message: "Requisition not created. Your user ID is not authorized for the Organization linked to this Sales Order."

Print Sales Order Pick List (OERPICK)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click Print/Preview, Costpoint displays all records where you have full rights to the organization.
- When you select the Update Sales Order Pick List printed flag, Costpoint only updates and processes records where you have full rights to the organization.
- When you click an SO and the SO selected is linked to an organization not authorized for your logged-in user ID, Costpoint displays an error message.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization linked to the SO, and the following message is printed: "SO information not printed. Your user ID is not authorized for the Organization on this Sales Order."

Manage Sales Order Inventory Issues (OEMISSU1)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization and project owning organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- A new field, Organization, has been added to the screen to display the organization ID for the sales order.
- Costpoint now saves the organization linked to the sales order in the inventory transaction table.

Manage Sales Order Non-Inventory Issues (OEMISSU2)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- A new field, Organization, has been added to the screen to display the organization ID for the sales order.
- Costpoint now saves the organization linked to the sales order in the inventory transaction table.

Manage Shipping Transactions (OEMSHIP)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the organization linked to the SO associated with the shipping transactions. If this organization ID in the header section is blank, Costpoint will not display the record.
- A new field, **Organization**, has been added to the screen to display the organization ID for the sales order.

Print Packing Slips (OERPCKSL)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Print/Preview**, Costpoint displays all records where you have full rights to the sales order's organization.
- When you select **Flag Packing Slip as Printed**, Costpoint only updates and processes records where you have full rights to the sales order's organization.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization linked to the SO, and the following message is printed: "SO information not printed. Your user ID is not authorized for the Organization linked to this sales order."

Print DD250 Packing Slips (OER250PS)

The following are the changes to this screen:

- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Costpoint now validates your selected/entered entries against your logged-in user ID's organization rights.

- When you click **Print/Preview**, Costpoint displays packing slips where you have full rights to the sales orders' organization.
- When you select **Flag DD250/WA250 Packing Slips as Printed**, Costpoint only updates the flag of the packing slips where you have full rights to the sales orders' organization.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization associated with the SO in the packing slip, and the following message is printed: "Packing Sip information not printed. User is not authorized for the organization linked to the sales order."

Print WA250 Packing Slips (OERW250P)

The following are the changes to this screen:

- Lookup (Sales Order) — Costpoint now narrows the search and displays only sales orders linked to organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- Costpoint now validates your selected/entered entries against your logged-in user ID's organization and sales order's organization rights.
- When you click **Print/Preview**, Costpoint displays packing slips where you have full rights to the sales orders' organization.
- When you select **Update DD250/WA250 Printed Flag**, Costpoint only updates the flag of the packing slips where you have full rights to the sales orders' organization.
- Logic has been added to the application to suppress all line details in the report if your logged-in user ID does not have full rights to the organization associated with the SO in the packing slip, and the following message is printed: "Packing Slip information not printed. User is not authorized for the organization linked to the sales order."

Print Sales Order Approval Status Report (OERAPPR)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID.
- When you click Print/Preview, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

Print Sales Order Backlog Report (OERBLOG)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID.
- When you click Print/Preview, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

View Sales Analysis Information (OEQSALES)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click **Execute**, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

Create RFID Print File (OEPRFID)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you select **Create RFID Print File**, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

View Sales Order Status Information (OEQSTAT)

The following are the changes to this screen:

- Costpoint now validates your selected/entered entry against your logged-in user ID's organization rights for the SO.
- Lookup (Sales Order) — Costpoint now narrows the search and displays only SOs with organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display sales orders where organizations are left blank.
- When you click Execute, Costpoint displays records where you have full rights to the SO organization. In addition, Costpoint will not display sales orders where organizations are left blank.

Import Sales Orders (AOPSOPP)

The logic of this application has been changed to load/populate the new Organization field on the Manage Sales Orders screen.

Load Organization IDs (OEPLDORG)

Use this new screen (**Materials » Sales Order Entry » Sales Order Entry Utilities » Load Organization IDs**) to load or default a value to the new field, **Organization**, for sales orders.

> **Note:** You must run this utility before turning on organization security for a module. If you skip this process, query results will exclude sales orders with blank organization IDs.

Load Organization IDs (INPLDORG)

Use this new screen (**Materials » Inventory » Inventory Utilities » Load Organization IDs**) to load or default material handler's organizations for miscellaneous receipts and location transfer IDs. This utility automatically runs in the backend to populate the inventory transaction table for the other inventory transaction types such as Issue to Purchase Order (ISSUEPO), Issue to Manufacturing Order (ISSUEMO), Quantity Adjustment (ADJQTY), Cost Adjustment (ADJCST), Scrap Adjustment (ADJSCRAP), Project/Account Transfer (TRNFPAO), PO Receipt (TRNFRCPT). It populates either the owning organization linked to the project or the material organization linked to the inventory abbreviation associated with the inventory transaction.

Note: You must run this utility before turning on organization security for a module. If you skip this process, query results will exclude sales orders with blank organization IDs.

Create Inventory Allocations (INPALLOC)

The following are the changes to the lookup screen:

- Manufacturing Order — Costpoint now narrows the search and displays only manufacturing orders (MOs) where the logged-in user ID is authorized for the planner's organization ID. Costpoint will not display MOs without the planner's organization ID.
- Purchase Order — Costpoint now narrows the search and displays only POs where the logged-in user ID is authorized for the buyer's organization ID. Costpoint will not display POs without the buyer's organization ID.
- Inventory Issues — Costpoint now narrows the search and displays only inventory issue records where the logged-in user ID is authorized for the **To Organization**. Costpoint will not display records with blank **To Organization**.
- Inventory Transfer — Costpoint now narrows the search and displays only records where the logged-in user ID is authorized for the **To Organization**. Costpoint will not display records with blank **To Organization**.
- Sales Order — Costpoint now narrows the search and displays only sales orders where the logged-in user ID is authorized for the sales order organization ID. Costpoint will not display records sales order organization IDs are left blank.
- Costpoint will not create allocations to the transactions where the logged-in user is not authorized for, or where the reference organization IDs are left blank.

View Purchase Order Status (POQSTAT)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's authorization for the buyer's organization ID. In addition, Costpoint will not display records where buyer's organization IDs are left blank.
- Costpoint now validates your selected/entered entry against your logged-in user ID's rights to buyer's organization and organization linked to the requisition.
- Lookup (Purchase Order) — Costpoint now narrows the search and displays only purchase orders (PO) with buyer's organizations that are authorized for the logged-in user ID. In addition, Costpoint will not display POs where buyer's organizations are left blank.

Rename Process Flag

The Flag DD250 Packing Slips as Printed was renamed to Flag DD250/WA250 Packing Slips as Printed.

System Requirements

This enhancement requires the following:

- cp711_sys_044.zip
- cp711_cmnlib_MMORGSECLIB_004.zip
- PATCH3489
- PATCH5122
- PATCH7151

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
MM	OE	OER250PS	Print DD250 Packing Slips	cp711_oer250ps_006.zip

MMDLVRYSCHDLIB Library

The MMDLVRYSCHDLIB library contains common business logic, which is shared by the following applications:

- Manage Purchase Requisitions (PPMNTRQ1)
- Manage Purchase Orders (POMMAIN)
- Approve Pending Purchase Orders (POMSTAT)
- Apply PO Info to Purchase Requisitions (PPMNTRQ2)
- Create Blanket Purchase Order Releases (POMRELS)
- Expedite Purchase Orders (POMEXPD)
- Apply PO Info to Purchase Requisitions by Line (PPMRQLN)
- View Purchase Order Status (POQSTAT)
- View Item Purchasing Information (POQITEM)
- View Purchase Order Change Orders (POQCHNG)
- Approve Purchase Requisitions (PPMRQAPX)
- Manage Purchase Order Vouchers (POMPOVCH)
- Approve Purchase Requisition Lines (PPMRQAPL)
- Assign Purchase Requisition to Buyers (PPMBUYAS)

- Assign Purchase Requisition Lines to Buyers (PPMBUYAL)
- View Purchase Requisition Status (PPQRQSTS)
- View Part Inventory (INQPINV)
- Manage Detailed Part Schedule (MRMDTPT)
- View Summary Part Availability (MRQSPA)
- Manage Simple Purchase Requisitions (PPMQREQ)

System Requirements

This enhancement requires the following:

- cp711_cmnlib_ MMDLVRYSCHDLIB _001.zip
- cp711_cmnlib_PPMENTRQ_017.zip
- cp711_sys_044.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
MM	PP	PPMRQLN	Apply PO Info to Purchase Requisitions by Line	cp711_ppmrqln_025.zip
MM	PO	POMEXPD	Expedite Purchase Orders	cp711_pomexpd_011.zip
MM	PO	POMMAIN	Manage Purchase Orders	cp711_pommain_039.zip
MM	PO	POMRELS	Create Blanket Purchase Order Releases	cp711_pomrels_022.zip

DVGMESUBLIB Library

The DVGMESUBLIB library contains common business logic, which is shared by the following applications:

- Manage Proposal BOM Cost Estimates-Indented (MEMPRPLI)
- Manage Proposal BOM Cost Estimates-Summarized (MEMPRPLS)

System Requirements

This enhancement requires the following:

- cp711_cmnlib_ DVGMESUBLIB _001.zip
- cp711_sys_044.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
MM	ME	Manage Proposal BOM Cost Estimates-Indented	MEMPRPLI	cp711_memprpli_007.zip
MM	ME	Manage Proposal BOM Cost Estimates-Summarized	MEMPRPLS	cp711_memprpls_004.zip

OEQSTATLIB Library

The OEQSTATLIB library contains common business logic, which is shared by the following applications:

- Select Invoices Ready for Use/Acceptance (OEMRFU)
- View Sales Analysis Information (OEQSALES)
- View Sales Order Status Information (OEQSTAT)

System Requirements

This enhancement requires the following:

- cp711_cmnlib_ OEQSTATLIB _001.zip
- cp711_sys_044.zip

PCMMOISSLIB Library

The PCMMOISSLIB library contains common business logic, which is shared by the following applications:

- Enter Manufacturing Order Issues (PCMMOISS)
- Enter Manufacturing Order Issues (INMMOISS)

System Requirements

This enhancement requires the following:

- cp711_cmnlib_ PCMMOISSLIB _001.zip
- cp711_sys_044.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
MM	PC	PCMMOISS	Enter Manufacturing Order Issues	cp711_pcmmoiss_025.zip
MM	IN	INMMOISS	Enter Manufacturing Order Issues	cp711_inmmoiss_001.zip

Administration

New Word Template Application and Add-In

The **Costpoint Word Template Add-in** is available to download from Deltek Software Manager. Use the add-in to easily build Word report templates which are then used with the new **Manage Word Templates (SYMWRPTM)** application in Costpoint to print customized reports.

System Requirements

This enhancement requires the following:

- PATCH7133
- cp711_symwrptm_001.zip
- cp711_sys_032.zip
  DeltekCostpointWordTemplateAddIn_Build01.exe

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

There are no changes to Costpoint Integration for this release.

Budgeting and Planning

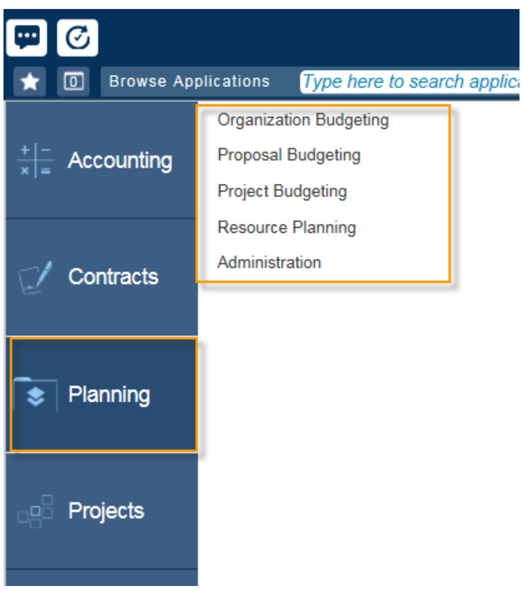
Planning

Planning Domain Created

Warning: This enhancement includes changes to security that will affect the ability of users to access certain applications. See "Security Changes Required for New Modules" below for related information.

A Planning domain was added to Costpoint so that all the Budgeting & Planning applications can be housed in the same location. Previously, Budgeting & Planning applications were contained within three separate Costpoint domains (Accounting, Projects, and Administration).

A Proposal Budgeting module was also added, which contains certain applications that were previously located within Project Budgeting. Additionally, planning-specific applications were relocated to a new Resource Planning module.

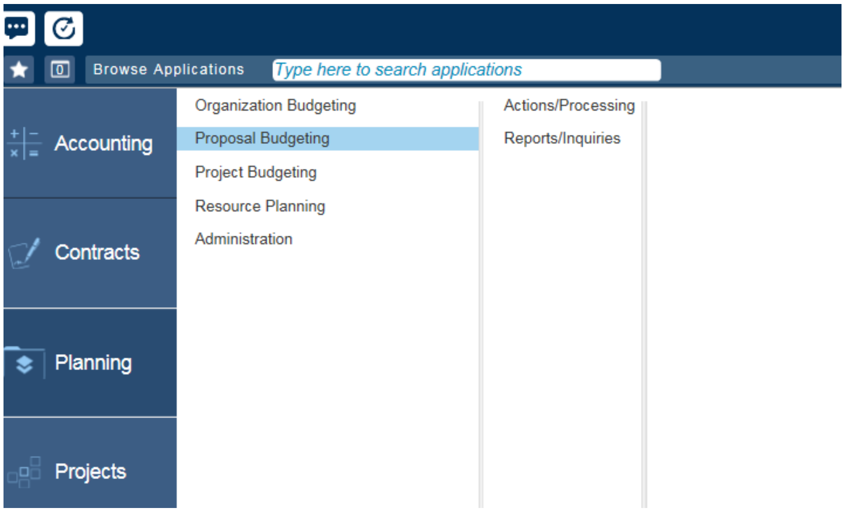


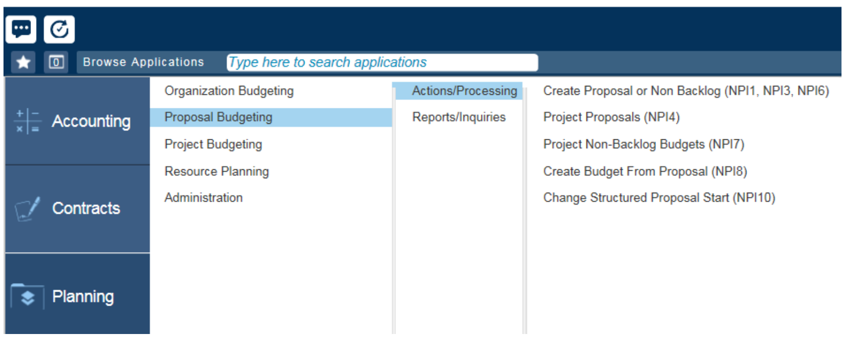
The new domain and restructured menu help accommodate the many users who only need access to the planning capabilities of Budgeting & Planning. .

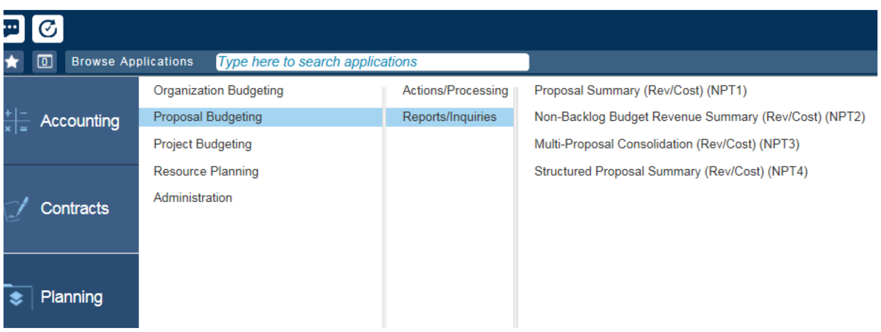
Proposal Budgeting Module

Proposal Budgeting is now a separate module.

This module contains the Actions/Processing and the Reports/Inquiries applications.

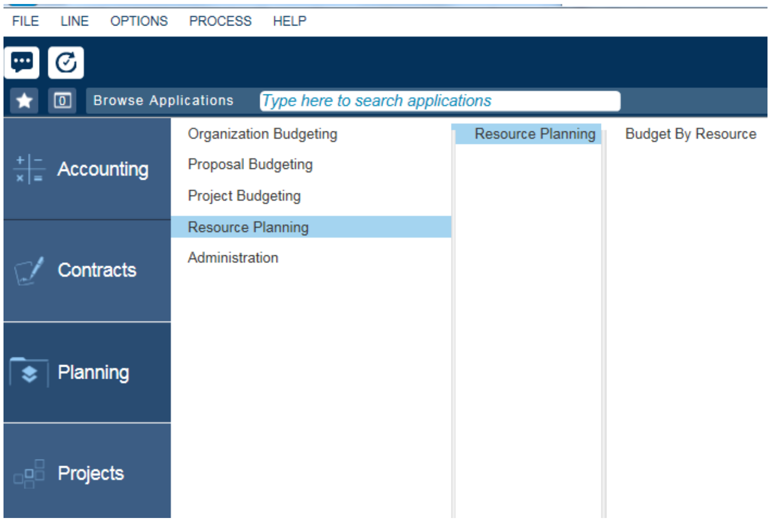






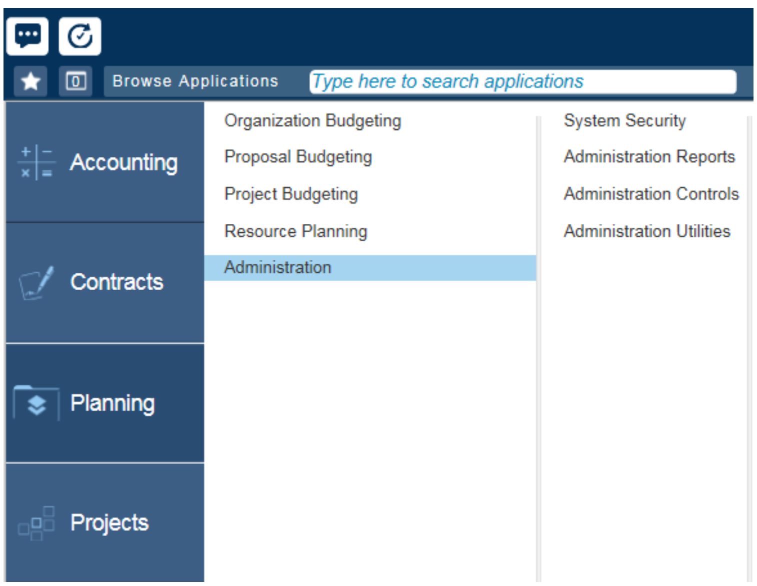
New Resource Planning Module

A new module called **Resource Planning** was also created. This module contains the **Budget By Resource** application**.**



Administration Module Changes

Budgeting Administration module was changed to **Administration** and the File Management module was removed. File Management is now part of the Costpoint Administration Domain.

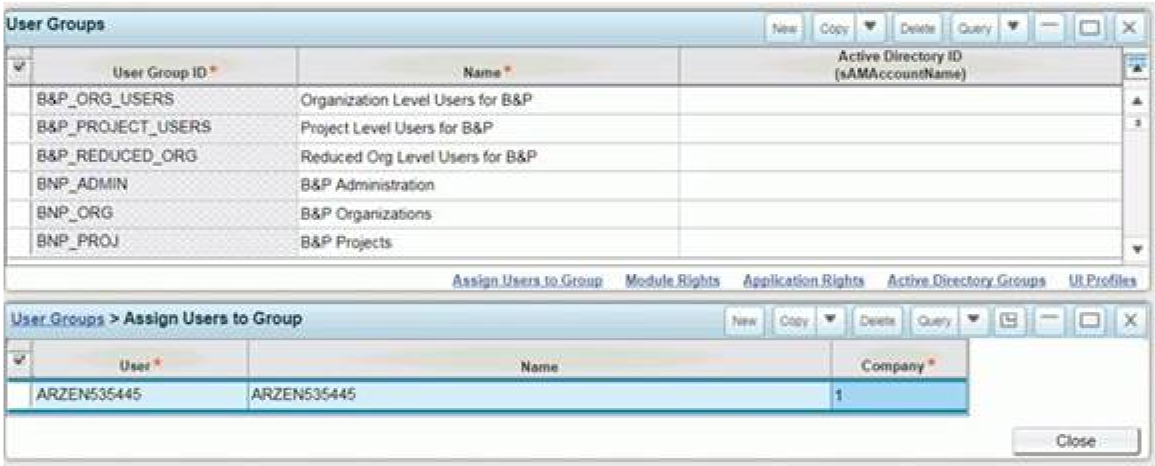


Security Changes Required for New Modules

The CP administrator needs to assign the Proposal Budgeting and Resource Planning modules to the User Groups affected otherwise they will have no access to the new modules until new security is added.

To set User Groups, complete the following steps:

1. Click **Administration » Security » System Security » Manage User Groups**.
2. Select **Assign Users to Group** subtask
3. Select **Module Rights** subtask



- **Module Rights** — Use this subtask to assign Read-Only, Full, or Deny rights in one or more Costpoint modules to a user group by company.

For a complete listing of the new menu structure, see DeltekBudgetingandPlanning700MenuMapping70to61.pdf

Requirements

The enhancement requires

cp711_bnp_common_011.zip

Application JAR Requirements

The following table shows the required application JAR version for the screens affected by this update:

Domain	Module » Application Group	Application ID	Application Name	Application File
Planning	**Resource Planning » Resource Planning**	BNP_BGMBPIR	Budget by Resource	cp711_bp_bnp_bgmbpir_006.zip
Planning	**Proposal Budgeting » Actions Processing**	BNP_NBMNPI4	Project Proposals (NPI4)	cp711_bp_bnp_nbmnpi4_007.zip

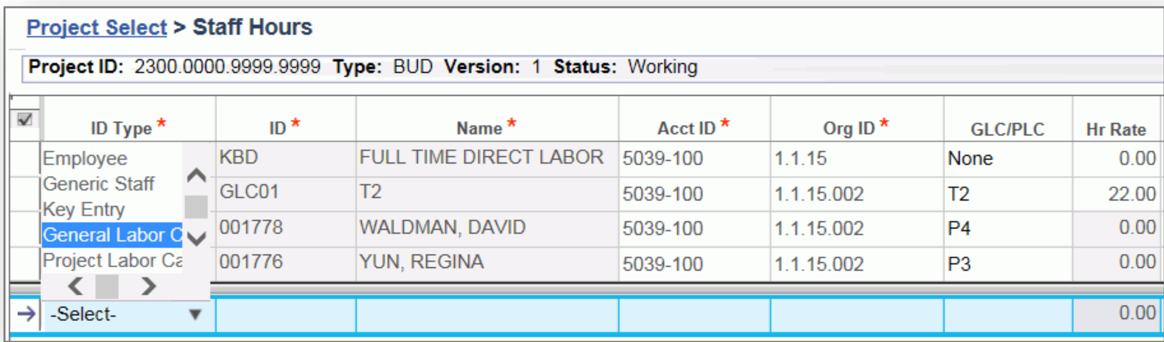
Budget Labor Hours by GLC or PLC

Labor budgeting was enhanced to allow budgeting by labor category, either GLC (general labor category) or PLC (project labor category), without the need to specify a resource.

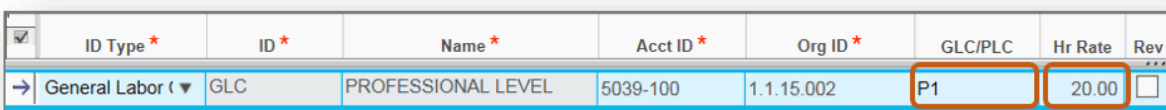
This update was applied to the following applications within the Planning Domain:

- **Project Budgeting » Budget/EAC Processing » Project Budget/EACs**
- **Proposal Budgeting » Actions/Processing » Project Proposals (NPI4)**
- **Proposal Budgeting » Actions/Processing » Project Non-Backlog Budgets (NPI7)**

When budgeting labor in the Staff Hours, Subcontractor Hours, or Consultant Hours subtasks in any of the above applications, you can assign hours directly to a labor category by selecting either GLC or PLC from the **ID Type** drop-down list.



The **PLC** column within these subtasks was renamed to **GLC/PLC**. The codes available for selection are determined by the **ID Type** selected. After you select the code, you can modify the **Hr Rate** field as needed. The amount in the **Hr Rate** field is the cost associated with the GLC/PLC.



Note that if the **Hr Rate** field defaults to zero and you do not enter a rate, revenue will not be offset by labor costs.

Prior to this enhancement, the cost (Hr Rate) of the resource (for example, employee, subcontractor, or consultant) was already established, so revenue was automatically offset by cost within the budget.

To help you manage GLC and PLC rates, two new applications have also been added to Budgeting & Planning.

Manage Cost Rates

To establish PLC and GLC rates outside of the budgeting application, use the following screens:

- **Planning » Project Budgeting » Controls and Utilities » Manage Average Cost GLC Rates**
- **Planning » Project Budgeting » Controls and Utilities » Manage Average Cost PLC Rates**

Note that these are existing Costpoint screens (**Projects » Advanced Project Budget Controls**) which were added to the Budgeting & Planning menu structure, so though technically not new, they are new within Budgeting & Planning.

These “new” screens are used to add or edit cost rates for an existing GLC or PLC. When that GLC or PLC is selected in a budgeting application, the rate automatically populates the **HR Rate** field. However, since that field remains editable, the rate can still be modified from within the budgeting application.

To learn more about these screens, see the following in the online Help:

- Manage Average Cost GLC Rates
- Manage Average Cost PLC Rates

Project Labor Category Subtask Updates

Other changes related to this feature were applied to the Project Labor Categories subtask, including the following:

- To improve usability, the subtask link now displays directly on the Project Budgets/EACs screen. It was previously located on the Revenue Setup/Ceilings subtask.
- Column labels were updated as follows:

  Link to Accounting System PLC label was changed to **Link to Project PLC**.

  Accounting PLC was changed to **Project PLC**.

  Accounting PLC Description was changed **Project PLC Description**.

Labor Report Updates

Project Budgeting reports are currently in the process of being updated to include labor hours budgeted by GLC or PLC. For this current release, the Revenue Analysis (BPA17) report was updated. Additional reports will be updated in future releases.

Requirements

cp711_bnp_common_011.zip

Administration

Project Budget Security Applied to Project Budgets/EACs

The Project Budgets/EACs screen was updated to reflect changes related to the new **Project Security to be based on** setting in **Planning » Administration » Administration Controls » Configuration Settings (MAM10)**.

If **Project Security to be based on** is selected as **Project Budget Security**, users will now have restricted access to the projects that display in Project Budgets/EACs application.

To learn more about this new security setting, see “DeltekBudgetingandPlanning700ReleaseNotesProjectBudgetSecurityOptionConfigurationSettings.pdf” from the July 2018 release.

Requirements

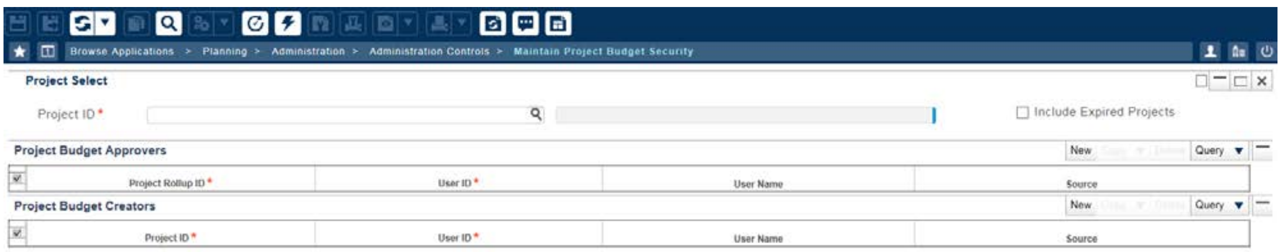
The following table shows the required file for the screen affected by this update:

Domain	Module » Application Group	Application ID	Application Name	Required File
Planning	Project Budgeting » Budget/EAC Processing	BNP_BGMPB IX	Project Budgets/EAC s	cp711_bnp_common_011.zi p

Project Budget Security Enhanced

A new Maintain Project Budget Security application was added that will enable Project Budget Accountants to separate Project Budget Creators and Project Budget Approvers similar to Org Budgeting.

To access this new application, go to **Planning » Administration » Administration Controls » Maintain Project Budget Security**



For more information screen fields, see the *Maintain Project Budget Security* online help topic.

Configure Project Budget Security

To use the Maintain Project Budget Secutiy application, you need to select **Project Budget Security** from the drop-down menu of the **Project Security to be based on field** of the Project tab of **Planning » Administration » Administration Controls » Configuration Settings (MAM10)**.

Note that this configuration setting was added in July 2018, and the default setting is Org ID.

Switching this setting to **Project Budget Security** allows Project Managers to approve and create project budget. If security is based on Org ID, and for example, a Project manager has a Home Org of an Overhead type, he or she could not edit project budgets and associated resources that have a Direct type of Home Org, such as Engineering or Construction.

Note that with the addition of the new **Project Security to be based on** configuration option, the **Manage Additional Project Budget Approvers (MAP8)** screen was made obsolete and has been removed. During installation, existing entries from Project Budget Approvers (MAP8) are migrated to **Maintain Project Budget Security**, where they are denoted by “MAP8” in the Source field.

This release includes menu changes related to the creation of the Planning Domain. It is highly recommended that cp711_sys_044.zip and cp711_bnp_common_011.zip be installed to reflect all framework changes, icons, positioning and application updates.

Refer to *DeltekBudgetingandPlanning700ReleaseNotesNewPlanningDomain.pdf* in DSM for more details.

Known Issue

Online Help for the Maintain Project Budget Security screen is not yet available for locally installed help, but it is for hosted help. The issue will be fixed for local help installations in the next release.

Requirements

The enhancement requires
cp711_bp_patch1304_001.zip

cp711_bnp_common_011.zip

Application JAR Requirements

The following table shows the required application JAR version for the screens affected by this update:

Domain	Module » Application Group	Application ID	Application Name	Application File
Planning	**Administration » Administration Controls**	BNP_BAMPBA	**Maintain Project Budget Security**	cp711_bp_bnp_bampba_001.zip

Vendor Employee Enhancements

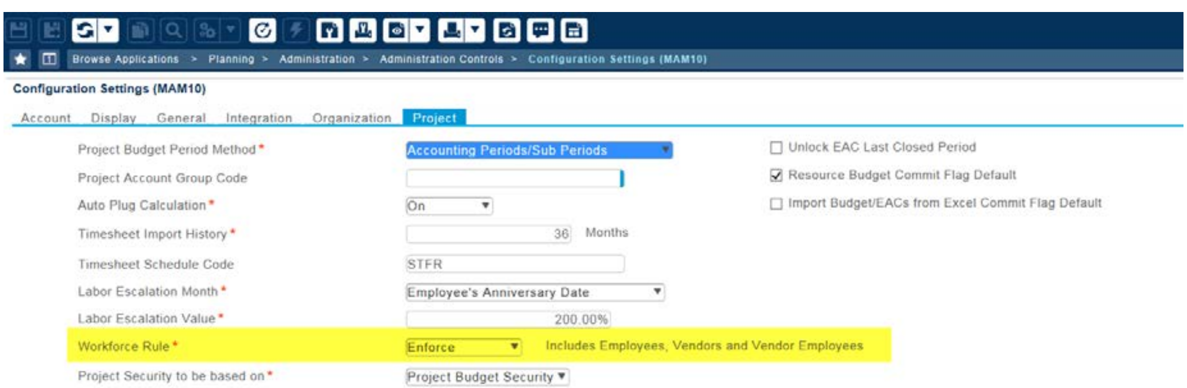
The Vendor Employee feature was further updated to include new configuration options as well as the ability to import budgets/EACs for Vendor Employees from Excel.

Configuration Setting Updates

The **Planning » Administration » Administration Controls » Configuration Settings (MAM10)** screen was updated as follows.

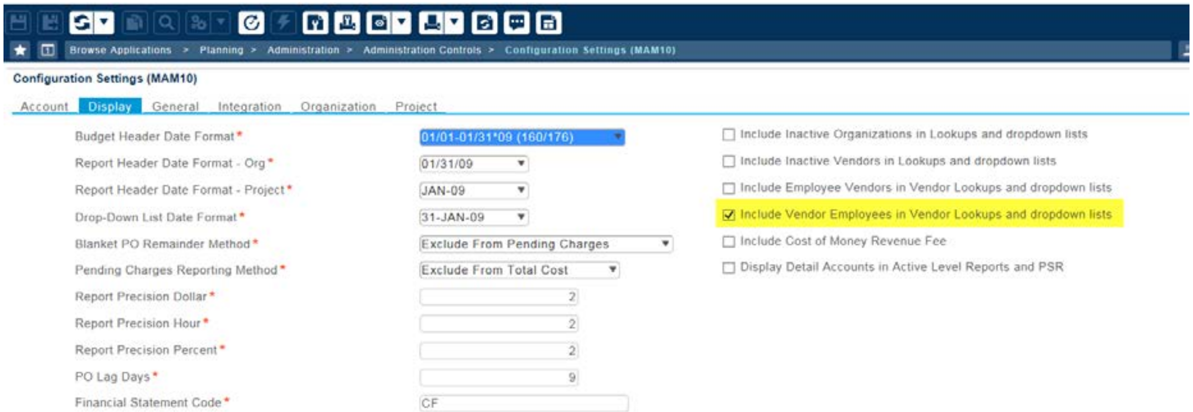
Workforce Rule Enforced for Vendor Employees

If Workforce Rule on the Project tab is set to Enforce, that setting will now also be applied to Vendor Employees. Prior to this enhancement it only enforced Employee Workforce. Note that the following screen text was added next to this field: “Includes Employees, Vendors and Vendor Employees.”



New Display Option

An **Include Vendor Employees in Vendor Lookups and Drop-Down** lists check box was added to the Display tab. Select this check box to include Vendor Employees in drop-down lists for screen entry and reporting.



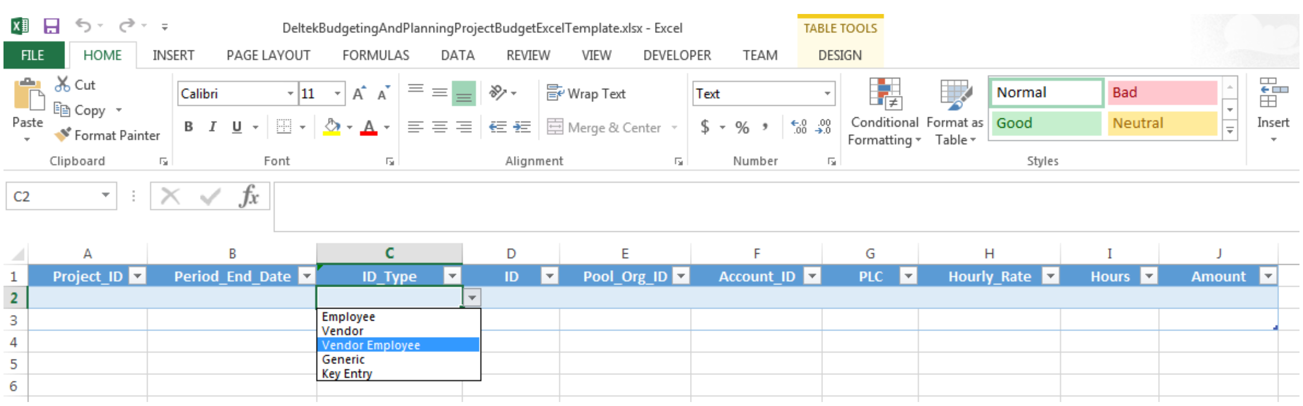
Note that there is an existing setting for Employee Vendors (**Include Employees Vendors in Vendor Lookups and Drop-Down**), which you should take care not to confuse with the new setting for Vendor Employees, who are employees of a subcontractor Vendor.

Conversely, Employee vendors are regular employees who have been set up as Vendors in **Accounting » Accounts Payable » Vendors » Manage Vendors** so that they can submit Expense Reports that are processed through Accounts Payable.

Import Vendor Employee Budget/EACs from Excel

The Import Budget/EACs from Excel application was updated to include the ability to import budgets for Vendor Employees.

To access this new option, go to **Planning » Project Budgeting » Controls and Utilities » Import Budget/EACs from Excel**, and click the **Excel Template** subtask. Follow screen instructions for downloading the updated template, which now includes **Vendor Employee** as an option in the **ID Type** drop-down list.



Note: An Hourly Rate for Vendor Employees should be completed on the Excel Template.

Requirements

The enhancement requires

cp711_bnp_common_011.zip

Application JAR Requirements

The following table shows the required application JAR version for the screens affected by this update:

Domain	Module » Application Group	Application ID	Application Name	Application File
Planning	Administration	bnp_bammam10	Configuration Settings (MAM10)	cp711_bp_bnp_bammam10_010.zip

Time and Expense

No enhancements were deployed for Time & Expense in August.

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