

Deltek Costpoint® 7.1.1

Cumulative Release Notes for March
2018

March 27, 2018

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Overview

This document is a compilation of the release notes distributed for the enhancements made in Costpoint, Budgeting and Planning, and Time & Expense in March 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

Security Assertion Markup Language (SAML) Support for Web Services

Costpoint is updated to support SAML authentication for Web service requests.

This enhancement requires the following:

- CPWebSecurityProviders.jar
- csbatools.jar
- cp711_sys_039.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).

Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

More Information:

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

Costpoint

Accounting

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

Projects

Include Project End Date on the Unbilled Analysis Report

Costpoint now allows you to include the project end date on the Unbilled Analysis Report (Summary Report and Detail Report) so you can compare the billed amounts with the end of the project and better determine risk situations that need to be addressed.

The Print Unbilled Analysis Report application has been updated for this enhancement. This screen now has the following new options:

- **Summary Report Column Options (Select 2 of 3)** — Use this new group box to specify the information that you want to include on the Summary Report. You can select up to two of the following three options: **Project End Date**, **Project Type**, and **Project Account Group**. Project Type and Project Account Group are selected by default, but can be modified. When you select **Project End Date**, the other two options are automatically cleared, and you can select either option.

If you already selected **Project Type** in the **Select By** drop-down list, **Project Type** in this group box is automatically cleared and disabled. Similarly, if you selected **Project Account Group** in **Select By**, **Project Account Group** in this group box is automatically cleared and disabled.

- **Detail Report Column Options** — Use this new group box to specify the information that you want to include on the Detail Report. **Project Type** is selected by default, but you can change it to **Project End Date**. You can select only one option.

If you already selected **Project Type** in the **Select By** drop-down list, **Project Type** in this group box is automatically cleared and disabled, and the default selection becomes **Project End Date**.

Requirement

This enhancement requires cp711_blrnbil_008.zip.

People

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

Regulatory and Compliance

IMPORTANT ANNOUNCEMENTS

Versions 7.0.1 and 7.1.1 – Calendar Year End 2018

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

Anticipated Calendar Year End 2018 System JAR Requirements:

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

Costpoint

Both System JARs introduced a much needed change to the State Filing Statuses in Costpoint. Rather than using filing statuses that only applied to Costpoint (Both, Miscellaneous 1, Miscellaneous 2, etc.) and had to be manually mapped to each state’s actual filing statuses, Costpoint 7.0.1 and 7.1.1 have been updated to use each state’s actual filing status(es). Though the new filing statuses were introduced 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 not only means that we can deploy Costpoint 7.1.1 regulatory updates and fixes more quickly, but it will also help us keep the System JAR requirements for Calendar Year End releases as minimal as possible.

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

2018 Federal Tax Table Updates

This Costpoint release updates the Affordable Care Act (ACA) data for payroll year 2018 and it also corrects both 2017 and 2016 data on the Manage Federal Taxes screen. This update is required in order to create an accurate ACA report.

The following are the updated 2018 Federal taxes and the correct data for 2017 and 2016:

	2018	2017	2016
Federal Poverty Level	\$12,140	\$12,060	\$11,880
Safe Harbor Affordability Rate	9.56%	9.69%	9.66%

Note: For more information, please see the following references:

<https://aspe.hhs.gov/prior-hhs-poverty-guidelines-and-federal-register-references>

<https://www.irs.gov/pub/irs-drop/rp-17-36.pdf>

Louisiana

The Louisiana Department of Revenue (LDR) updated the state’s income tax withholding tables to account for changes in federal tax law passed by the U.S. Congress late last year. LDR issued an emergency rule to ensure that employers are withholding the correct amount of state income taxes from employee paychecks. Louisiana tax rates for all filing statuses have changed.

This Costpoint release applies updates to Manage State Tax Withholding Adjustments screen and Manage State Tax Tables screen so that taxes will be calculated accurately for Louisiana payroll

Patch Requirements

These enhancements require Costpoint 7.1.1 PATCH3393 and PATCH3401.

North Dakota Withholding Tax

Costpoint

The North Dakota percentage method withholding tables were released by the State and the following are the updates to North Dakota withholding tax:

- The annual withholding tables for Single and Married have been updated.
- The amount of one withholding allowance increases from \$4,050 to **\$4,150**.

This Costpoint release updates the Manage State Taxes screen and Manage State Tax Tables screen for the accurate calculation of taxes for this State in Payroll.

Patch Requirements

These enhancements require Costpoint 7.1.1 PATCH3408.

Michigan Withholding Tax

The state of Michigan restored personal exemption as it existed before the 2017 federal tax code overhaul and increased it from \$4,000 to **\$4,050**.

This Costpoint release updates the Manage State Taxes screen for the accurate calculation of taxes for this State in Payroll.

Patch Requirements

This enhancement requires Costpoint 7.1.1 PATCH3412.

March SUTA Electronic Filing Updates

Missouri

Costpoint now provides the ability to report employees as officers of the corporation in the ICESA file format of Missouri's SUTA electronic filing. To accurately report officers in the SUTA tax file of Missouri, you must flag Missouri employees as an **Owner** on the Manage Employee Taxes screen. The employees will then be reported as officers when you create the Missouri SUTA tax file.

This release updates the Create Quarterly SUTA Tax File (PRPSMM) screen for Missouri SUTA Electronic Filing. When creating Missouri SUTA tax files, the application populates the **Officer Code** (S Record - Position 210) field based on the **Owner** check box on Tax Reporting Information tab of the Manage Employee Taxes screen.

The updates to Manage Employee Taxes (PRMETAX) screen for this feature will be released separately.

Kentucky

The Create Quarterly SUTA Tax File screen now reports excess wages in the S Record of Kentucky's ICESA file format. When creating the Kentucky SUTA tax file, the application will populate position 78-91 of the S Record with the employee's excess wages for the reported quarter.

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
People	Payroll	PRPSMM	Create Quarterly SUTA Tax File	cp711_prpsmm_020.zip

Missouri SUTA Electronic Filing

Costpoint

Costpoint now provides the ability to report employees as officers of the corporation in the ICESA file format of Missouri's SUTA electronic filing. To accurately report officers in the SUTA tax file of Missouri, you must flag Missouri employees as an **Owner** on the Manage Employee Taxes screen. The employees will then be reported as officers when you create the Missouri SUTA tax file.

Manage Employee Taxes (PRMETAX)

This release includes the following updates to the Manage Employee Taxes screen:

- You can now select the **Owner** check box under the **D.C., Massachusetts, Michigan, Missouri, New Mexico, Washington** label on Tax Reporting Information tab to report employees as officers when you create SUTA tax file of Missouri.
- The **Owner** check box label now indicates the State of Missouri.

Note: The updates to the Create Quarterly SUTA Tax File (PRPSMM) screen for this feature was released separately (Mid-March 2018).

HotFix Requirements

These enhancements require Costpoint 7.1.1 Common Lib - LDMEINFOLIB (cp711_cmplib_LDMEINFOLIB_005.zip).

Updated Personal Allowances Information in 2018 Form W-4

This Costpoint release updates the Personal Allowances information in the Allowances Worksheet to match the information from the 2018 Form W-4.

New Information in Personal Allowances Worksheet

The Allowances Worksheet tab, which is used for calculating your total number of allowances in the Federal Withholding (ESMFEDWH) and Life Events/New Hires (ESMLIFEEVENT) screens, now reflects updated Personal Allowances information from the 2018 Form W-4. The following text now display in this tab:

Use this Personal Allowances Worksheet to calculate your Total number of allowances.

1.) Select the appropriate conditions

- For yourself.
- If you will file as married filing jointly.
- If you will file as head of household.
- If you are single, or married filing separately, and have only one job; or you are married filing jointly, have only one job, and your spouse doesn't work; or your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.

2.) Child tax credit

If your total income will be less than \$69,801 (\$101,401 if married filing jointly), enter "4" for each eligible child.

If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 if married filing jointly), enter "2" for each eligible child.

If your total income will be from \$175,551 to \$200,000 (\$339,001 to \$400,000 if married filing jointly), enter "1" for each eligible child.

If your total income will be higher than \$200,000 (\$400,000 if married filing jointly), enter "0".

3.) Credit for other dependents

If your total income will be less than \$69,801 (\$101,401 if married filing jointly), enter "1" for each eligible dependent.

If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 if married filing jointly), enter "1" for every two dependents (for example, "0" for one dependent, "1" if you have two or three dependents, and "2" if you have four dependents).

If your total income will higher than \$175,550 (\$339,000 if married filing jointly), enter "0".

4.) Other credits

If you have other credits, see Worksheet 1-6 of Pub. 505 and enter the amount from that worksheet here.

The following Costpoint screens were updated to support this enhancement:

- Federal Withholding (ESMFEDWH)
- Life Events/New Hires (ESMLIVEEVENT)

HotFix Requirements

These enhancements require the following Costpoint 7.1.1 releases:

Common Lib – BENEFITSLIB (cp711_cmplib_BENEFITSLIB_007.zip)

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
People	Employee Self Service	ESMFEDWH	Federal Withholding	cp711_esmfedwh_007.zip

Domain	Module	Application ID	Application Name	Application File
People	Employee Self Service	ESMLIFEEVENT	Life Events/New Hires	cp711_esmlifeevent_017.zip

New York and San Francisco Paid Family Leave

The state of New York and city of San Francisco, California both implemented forms of Paid Family Leave in which eligible employees will receive compensation from their employers for specific leave based on family care.

The New York State Paid Family Leave Program provides New Yorkers job-protected, paid leave to bond with a new child, care for a loved one with a serious health condition or to help relieve family pressures when someone is called to active military service.

The San Francisco Paid Parental Leave Ordinance (SF PPLO) requires employers who have employees working in San Francisco to provide Supplemental Compensation to employees who are receiving California Paid Family Leave (PFL) benefits to bond with a new child, so that the employees receive up to 100% of their normal weekly wages during 6 weeks of parental leave.

If either or both are applicable to your company, the enhancements in this Costpoint release will allow you to comply with the Paid Family Leave requirements

Note: The information in this section is taken from the New York state website. For more information, please see:

- New York Paid Leave: <https://www.ny.gov/new-york-state-paid-family-leave/new-york-state-paid-family-leave-employers>.
 - San Francisco Paid Parental Leave Ordinance (PPLO): <https://sfgov.org/olse/sites/default/files/FAQ%20March%202017.pdf>
-

New York Paid Family Leave

Nearly all private employees in New York State will be eligible for Paid Family Leave. Insurance coverage for Paid Family Leave must be available to employees beginning January 1, 2018, and generally will be included under an employer's existing disability benefits policy.

Paid Family Leave coverage is funded by employee payroll contributions.

Public employers may opt into the program. Public employees represented by a union may be covered if Paid Family Leave is collectively bargained.

Employees are guaranteed:

- Wage replacement for 8 weeks in 2018, increasing to 12 weeks by 2021;
- Job protection upon return from Paid Family Leave; and
- Continuation of health insurance while out on Paid Family Leave.

New York Paid Family Leave – Employee Payroll Contributions

Paid Family Leave coverage is funded by employee payroll contributions. Use the ny.gov/pflcalculator to get an estimate of an employee's weekly deduction.

Costpoint

The 2018 payroll contribution is 0.126% of an employee's weekly wage and is capped at an annual maximum of \$85.56. If an employee earns less than the New York State Average Weekly Wage (\$1305.92 per week), they will have an annual contribution amount less than the cap of \$85.56, consistent with their actual weekly wages.

For example, in 2018, if an employee earns \$27,000 a year (\$519 a week), they will pay 65 cents per week.

The employee contributions that are withheld for Paid Family Leave are to be used to pay for the insurance.

Deductions and Employee Deductions Setup for New York Paid Family Leave

Apply the following Deductions and Employee Deductions setup for New York Paid Family Leave:

1. On the Manage Deductions (PRMDED) screen, set up a Deduction with the following settings to be used to deduct the New York Paid Family Leave employee contribution:
 - **Deduction Type** — MISC
 - **Deduction** — Select this check box.
 - **Computation Method** — FIXAMT
 - **Amount** — This value will need to be set at the employee level since it's based on a percentage of each employee's average weekly wage, which can vary by employee. However, if most of your employees have an average weekly wage that is greater than 1,305.92 and have the same pay frequency, you may want to enter this value as follows to alleviate some data entry at the employee level:
 - If the pay frequency is 'Weekly' for most employees then populate this field with 1.65 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Weekly')
 - If the pay frequency is 'Bi-Weekly' for most employees then populate this field with 3.30 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Bi- Weekly')
 - If the pay frequency is 'Semi-Monthly' for most employees then populate this field with 3.575 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Semi-Monthly')
 - If the pay frequency is 'Monthly' for most employees then populate this field with 7.15 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Monthly')
 - **Ceiling Method** — Payroll Year
 - **Ceiling Amount** — 85.80
 - **W-2 Box 14 Usage** — Set this value so the amount will be included in Box 14 of the W-2.
 - Enter other required data.
2. On the Manage Employee Deductions (PRMEDED) screen, set up an Employee Deductions record with following settings for each affected employee:
 - **Deduction** — New York Paid Family Leave Deduction
 - **Method** — FIXAMT
 - **Rate** — Use the following guidelines:
 - If the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Weekly' then populate this field with 1.65
 - Else, if the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Bi-Weekly' then populate this field with 3.30

- Else, if the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Semi-Monthly' then populate this field with 3.575
- Else, if the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Monthly' then populate this field with 7.15
- Else, if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Weekly' then populate this field with the result of this calculation:
Employee's Average Weekly Wage x 0.126%
- Else, if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Bi-Weekly' then populate this field with the result of this calculation:
((Employee's Average Weekly Wage x 0.126%) x 52) / 26
- Else, if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Semi-Monthly' then populate this field with the result of this calculation:
((Employee's Average Weekly Wage x 0.126%) x 52) / 24
- Else if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Monthly' then populate this field with the result of this calculation:
((Employee's Average Weekly Wage x 0.126%) x 52) / 12
- **Limit:** 85.80
- **Start Date:** Set, if needed
- **End Date:** Set, if needed

Employee and Leave Setup for New York Paid Family Leave

Apply the following Employee and Leave settings for New York Paid Family Leave:

1. Ensure the **Allow Overtime for Salaried, FLSA Exempt Employees** check box is selected in Configure Labor Settings. In order to use this functionality, you will need to use an Overtime pay type to pay salaried, exempt employees.

If the check box is already selected, proceed to the next step. If the check box is not already selected, select the box, save the record, and then run the Rebuild Global Settings (SYPSTNG) application for the Labor module.
2. Set up a pay type to be used for New York Paid Family Leave with the following settings:
 - **Factor** — 1
 - **Additional Calculation Based on an Amount** group box
 - **Select the Add pay type amount to timesheet line** — Select this option.
 - **Amount** — 0.00
 - Pay Type Categories group box
 - **Overtime** — Select this check box
 - **Exclude from Salary Caps** — Select this check box.
 - **Employee Eligibility** group box
 - **Exempt** — Select this check box.
 - **Non-Exempt check box** — Select this check box.
 - **Salaried check box** — Select this check box.
 - **Overtime Premium Recasting** group box

- **Eligible for overtime premium recasting** — Clear this check box.
- **Allocate Compensate Overtime** group box
 - **Calculate overtime premium on this pay type** — Clear this check box.
 - **Allocate overtime premium to this pay type** — Clear this check box.
- **Weighted Averages** – Not applicable
- 3. Set up a leave type to be used for New York Paid Family Leave (Expense Account only) and flag as Paid Family Leave.
 - **Use for Paid Family Leave** – Select this check box.
 - **Balance Ceiling Method** – No Ceiling
 - **Pay Balance Upon Termination** — Clear this check box.
 - **Leave Balance Floor** — 0.00
 - **Floor Edit Method** — Error
- 4. Set up a leave code to be used for New York Paid Family Leave.
 - **Leave Type** — Select the leave type that you set up for New York Paid Family Leave (step #3).
 - **Include Negative Balances in Leave Year Carryover** – Clear this check box.
 - **Report Leave to Employee in Days** — Clear this check box.
 - **Basis for Leave Deferral** group box
 - **Leave Hire Date** — Select this option.
 - **Days to Defer Leave Usage** — 0
 - **Leave Modifier** — This field should be blank.
 - **Base Hours worked on Eligible Labor Locations** — Clear this check box.
 - Leave Table Details
 - **Months of Service** — 0
 - **Compute Method** — F-Block Grant on Paid Family Leave Date
 - **Unit of Hours** — 0
 - **Annual (C) Block Grant Date** — This field should be blank.
 - **One-Time (D) Block Grant Date** — This field should be blank.
 - **Accrual Rate** — Populate with the average number of hours the employee worked per week during the PPL.
- 5. Assign the leave type to the employee.
 - **Family Paid Leave Information** — This is required because the Compute Method is F-Block Grant on Paid Family Leave Date.
 - **Paid Family Leave Date/Satisfaction of Preconditions Date** — *Supplemental Compensation should be paid on the payday for the next full pay period following the employee's satisfaction of all preconditions.
 - **EDD Maximum Benefit Amount** — The amount EDD pays to the EE. From EDD Notice of Computation.
 - **EDD Weekly Benefit Amount** — The amount EDD pays to the EE. From EDD Notice of Computation.
 - **EDD Daily Benefit Amount** — The amount EDD pays to the EE. From EDD Notice of Computation.
 - **EDD Claim Effective Date** — From EDD Notice of Computation.

- **Employee's Normal Weekly Wage** — If greater than the CA Maximum Weekly Benefit Amount, then replace with the CA Maximum Weekly Benefit Amount.
- **Weekly Supplemental Compensation Amount** — This is equal to: Normal Weekly Wage – EDD Weekly Benefit Amount
- **Average number of hours that employee worked per week during the PPLO Lookback Period** — This will be used to determine the Hourly Supplemental Compensation.
- **Hourly Supplemental Compensation Amount** — Weekly Supplemental Compensation Amount / Average Number of Hours per Week.
- **EE's Normal Daily Wage** — This is equal to: EE's Normal Weekly Wage / Days per Week
- **Pay Period Compensation Amount** — This is equal to: (Weekly Supplemental Compensation Amount x 52) / Pay Period Frequency
- **End Date of Leave** — The last day the employee can use the paid family leave.

San Francisco PPLO Processing

San Francisco employers will be responsible for the completing the following steps in Costpoint:

1. On the Manage Leave Types screen, set up a leave type to be used for San Francisco Employer- Funded Paid Parental Leave.

Under the SF PPLO, employers are required to provide employees receiving state PFL for new child bonding with "Supplemental Compensation" equal to the difference between the employee's PFL benefit amount and the employee's normal gross weekly wages such that the employee receives up to 100% of their weekly wages, subject to a weekly maximum benefit amount, for up to 6 weeks. Select the **Use for Paid Family Leave** check box if you are not paying the employee his/her full wages for the leave.
2. On the Manage Leave Codes screen, set up a leave code to be used for San Francisco Employer-Funded Paid Parental Leave. If the specified leave type's **Use for Paid Family Leave** check box is selected in Manage Leave Types, the **Compute Method** will default to **F-Block Grant on Paid Family Leave Accrual Date** and you will not be able to use any other Compute Method.
3. Determine the employee's eligibility for coverage
4. Determine the following values in order to calculate an Hourly Supplemental Compensation Amount (This would come from the **Notice of Computation** from the State EDD):
 - EDD Maximum Benefit Amount (currently 2133.00)
 - Employee's Normal Weekly Wage (up to limit of EDD Maximum Benefit Amount)
 - EDD Weekly Benefit Amount (from EDD Notice of Computation)
 - SF PPLO Supplemental Compensation Limit (currently \$960 (45% of 2133.00))
 - Multiple Employer flag
 - Normal Weekly Wage from other Employer(s)
 - Average number of hours that employee worked per week during the PPLO Lookback Period (will be used to determine the Hourly Supplemental Compensation)
 - Weeks Covered by Year (currently 6 weeks)
5. Calculate the Hourly Supplemental Compensation Amount

EE Normal Gross Weekly Wage for this Employer = Determine the employee's average weekly wage

 - If weekly wages are constant then use the amount for the week immediately preceding the leave period

Costpoint

- If weekly wages are not constant, they must be calculated based on the Paid Parental Leave lookback period. The lookback period is defined as “immediately preceding the start of the employee’s California [Dec 2016 Rev] Paid Family Leave Period (or immediately preceding pregnancy disability leave for women transitioning directly to Paid Family Leave).” The period contains six bi-weekly or semi-monthly, or 12 weekly pay periods and is codified at 3300H.4(b)1(B).

Note: For more information, please see: <http://sfgov.org/olse/PAID-PARENTAL-LEAVE-CALCULATIONS>.

6. On the Manage Employee Leave screen, assign the company’s San Francisco Paid Family Leave - leave type and leave code to the employee.

Note: The Leave Hire Date must be set to the effective date of the Paid Family Leave.

7. Compute and post leave for the employee to give the employee the block grant.
8. To charge Paid Family Leave on a timesheet, the employee must do the following:
 - Use the leave type’s account (Accrual Account if the leave was accrued and posted to the GL as a liability or use the Expense Account if used Paid Family Leave is expensed)
 - Use the appropriate pay type on the timesheet so that the correct rules are applied
9. Before posting timesheets, run the Apply Timesheet Adjustments in Batch Mode (LDPAUTO) utility for Paid Family Leave so that the appropriate labor cost adjustments are made to the timesheets.
10. If you want to reverse the Paid Family Leave adjustments on timesheets that have not yet been posted or processed for leave or payroll, complete the following steps:
 - Select the **Reverse Paid Family Leave** option on the Apply Timesheet Adjustments in Batch Mode screen.
 - On the **Selection Ranges** group box, select the timesheets which need to be processed
 - Print the Apply Timesheet Adjustments in Batch Mode report
 - Process.

Screen Updates

Import Timesheets (AOPUTLTS)

When the application adds a timesheet line to an existing timesheet that has at least one existing Paid Family Leave timesheet line, the application will not auto-adjust the timesheet. Validations for the following were added to the application:

- To prevent entry or import of a timesheet where at least one of the timesheet lines has a timesheet line date that is not within the employee’s Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is less than the employee’s Paid Family Leave period.
- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is less than the employee’s Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is greater than the employee’s Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.

For example, an employee has the following:

- Paid Family Leave period is 01/01/2018 to 04/13/18.

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- Timesheet frequency is semi-monthly.

A timesheet is entered or imported in April 2018 with a date of 04/15/18, but no timesheet line dates to indicate what day each charge was incurred. Without timesheet line dates, Costpoint will assume the timesheet includes the entire timesheet period. Therefore, it will assume the timesheet may include hours charged between 04/01/18 and 04/13/18 (the last 13 days of the employee's Paid Family Leave period).

Therefore, any charges to Paid Family Leave within this timesheet will pass validation.

- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.
- To prevent users from charging hours to an Account that's linked to a Paid Family Leave - leave type if the pay type does not have the following setup in the **Manage Pay Types** screen:
 - **Factor** — 1
 - **Additional Amount** — 0.00
 - **Overtime check box** — Unchecked
 - **Cost-only check box** — Unchecked
 - **Leave Without Pay (LWOP) check box** — Unchecked
 - **Leave Without Pay (LWOP) Negative check box** — Unchecked
 - **Severance check box** — Unchecked
 - **Eligible for overtime premium recasting check box** — Unchecked
 - **Allocate overtime premium to this Pay Type check box:** Unchecked
 - **Weighted Averages option** — Not Applicable (do not include or recalculate) option

Manage Timesheets (LDMTIME)/Manage Correcting Timesheets (LDMCTIME)

The Manage Timesheets and Manage Correcting Timesheet screens have new validations to prevent adjustments and changes on certain fields if the timesheet has been adjusted for Paid Family Leave.

Note: If you need to adjust the labor cost on a timesheet line that charges Paid Family Leave, use Apply Timesheet Adjustments in Batch Mode to reverse the Paid Family Leave adjustments. After reversing, you may edit the timesheet.

The applications were updated so that when adding a timesheet line to an existing timesheet and that existing timesheet has already has at least one Paid Family Leave timesheet line, the applications will not auto-adjust the timesheet.

Validations were also added to the screen for the following:

- To prevent entry or import of a timesheet where at least one of the timesheet lines has a timesheet line date that is not within the employee's Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is less than the employee's Paid Family Leave period.
- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is less than the employee's Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.

For example, an employee has the following set up:

- Paid Family Leave period is 01/01/2018 to 04/13/18.
- Timesheet frequency is semi-monthly.

A timesheet is entered or imported in April 2018 with a date of 04/15/18, but no timesheet line dates to indicate what day each charge was incurred. Without timesheet line dates, Costpoint will assume the timesheet includes the entire timesheet period. Therefore, it will assume the timesheet may include hours charged between 04/01/18 and 04/13/18 (the last 13 days of the employee's Paid Family Leave period).

Therefore, any charges to Paid Family Leave within this timesheet will pass validation.

- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.
- To prevent users from charging hours to an Account that's linked to a Paid Family Leave - leave type if the pay type does not have the following setup the **Manage Pay Types** screen:

- **Factor** — 1

- **Additional Amount** — 0.00
- **Overtime check box** — Unchecked
- **Cost-only check box** — Unchecked
- **Leave Without Pay (LWOP) check box** — Unchecked
- **Leave Without Pay (LWOP) Negative check box** — Unchecked
- **Severance check box** — Unchecked
- **Eligible for overtime premium recasting check box** — Unchecked
- **Allocate overtime premium to this Pay Type check box** — Unchecked
- **Weighted Averages option** — Not Applicable (do not include or recalculate)

The screenshot displays the 'Manage Pay Types' interface. At the top, the breadcrumb trail is 'Browse Applications > People > Labor > Labor Rate Controls > Manage Pay Types'. The main header shows 'Pay Type Code * PFL', 'Description * Paid Family Leave', and 'Factor * 1.0000'. Below this, the 'Details' section is divided into several panels:

- Additional Calculations Based on an Amount:** Three radio buttons are present: 'Add pay type amount to timesheet line' (selected), 'Multiply hours times pay type amount', and 'Multiply hours times pay type amount times factor'. An 'Amount *' field is set to '0.0000'.
- Employee Eligibility:** Three checkboxes are checked: 'Exempt', 'Non-Exempt', and 'Salaried'.
- Overtime Premium Recasting:** The checkbox 'Eligible for overtime premium recasting' is unchecked. A 'Recast Pay Type' dropdown menu is visible.
- Allocate Compensated Overtime:** Two checkboxes are unchecked: 'Calculate overtime premium on this Pay Type' and 'Allocate overtime premium to this Pay Type'.
- Weighted Averages:** Three radio buttons are present: 'Include this Pay Type in determining the weighted average', 'Recalculate this Pay Type', and 'Not applicable (do not include or recalculate)' (selected).

At the bottom right, there is a link for 'Transaction Currency Overrides'.

Manage Employee Leave (LDMELV)

The following are updates to the Manage Employee Leave screen:

- A new **Used for Paid Family Leave** check box indicates whether the leave type selected is flagged as **Use for Paid Family Leave** on the Manage Leave Types screen.
- A new Paid Family Leave subtask allows you to enter leave charging details that will be used in Paid Family Leave processing. You must enter at least one row in this subtask if the leave type selected is flagged as **Used for Paid Family Leave**. This subtask contains the following fields:
 - **Effective Date** — This is the effective date of the employee's Paid Family Leave period.
 - **End Date** — This is the end date of the employee's Paid Family Leave period.
 - **Accrual Date** — This is the date on which the employee should receive the Paid Family Leave accrual.
 - **Jurisdiction** — This is the city or State which mandated the paid family leave.
 - **Allows Hourly Charging** — This is an information-only field.
 - **Average Weekly Wage** — This is determined by employer based on State/City rules.
 - **Average Weekly Hours** — This is determined by employer based on State/City rules.

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- **Average Hourly Compensation Rate** — Disabled field. This is automatically calculated by dividing the **Average Weekly Wage** by the **Average Weekly Hours**.
- **Override Accrual Rate** — The accrual rate to be used if the employer needs to override the accrual rate assigned to the leave code. This field is needed since accrual rates can vary from employee-to-employee.

Reconcile Leave Balances (LDPLVREC)

If leave types are flagged as **Use for Paid Family Leave**, the reconciliation process will not include the corresponding employee/leave type.

Apply Timesheet Adjustments in Batch Mode (LDPAUTO)

The **Process Type** group box includes the following options for Paid Family Leave processing:

- **Paid Family Leave** — Select this option to apply labor cost adjustments for hours charged to a **Paid Family Leave** - leave type.
- **Reverse Paid Family Leave** — Select this option to reverse Paid Family Leave adjustments on timesheets within the specified screen parameters.

Close Leave Year (LDPLYCLS)

If you enable the Multicurrency functionality, the application will not process gains and losses for **Paid Family Leave** - leave types.

Compute Leave (LDPCLHF)

The Compute Leave process will now apply the following when processing leave types that are flagged as **Use for Paid Family Leave** on the Manage Leave Types screen:

- If the employee's leave type is flagged as **Use for Paid Family Leave** in Manage Leave Types, the application will only select employee/leave Type for processing if:
 - The employee/leave type combination exists in the Paid Family Leave subtask of the Manage Employee Leave screen.
 - The employee's Paid Family Leave - Accrual Date is between the open leave period's start date and the open leave period's end date
- If Paid Family Leave is being processed, then the Paid Family Leave-Average Hourly Compensation Rate, instead of the employee's Hourly Amount, will be used to determine the Accrual Amount.

Create Retroactive Timesheet Adjustments (LDPRETRO)

The Create Retroactive Timesheet Adjustments processing will not include timesheet lines with accounts that are linked to a leave type that is flagged as **Use for Paid Family Leave**.

Import Timesheets from Deltek Time and Expense (LDPUPET)

The following are updates to the Import Timesheets from Deltek Time and Expense processing:

1. When the application adds a timesheet line to an existing timesheet that has at least one existing Paid Family Leave timesheet line, the application will not auto-adjust the timesheet.
2. The application will prevent users from importing a timesheet where at least one of the timesheet lines is charging Paid Family Leave and a Timesheet Line Date is specified, but the timesheet line date is not within the employee's Paid Family Leave period.
3. The application will prevent users from importing a timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates and the timesheet date is less than the employee's Paid Family Leave period.
4. The application will prevent users from importing a C-Correcting or D-Correcting timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates and the Reference Date is less than the employee's Paid Family Leave period.

5. The application will prevent users from importing a C-Correcting or D-Correcting timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates and the Reference Date.
6. The application will prevent users from importing an R-Regular timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates, and the timesheet date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.

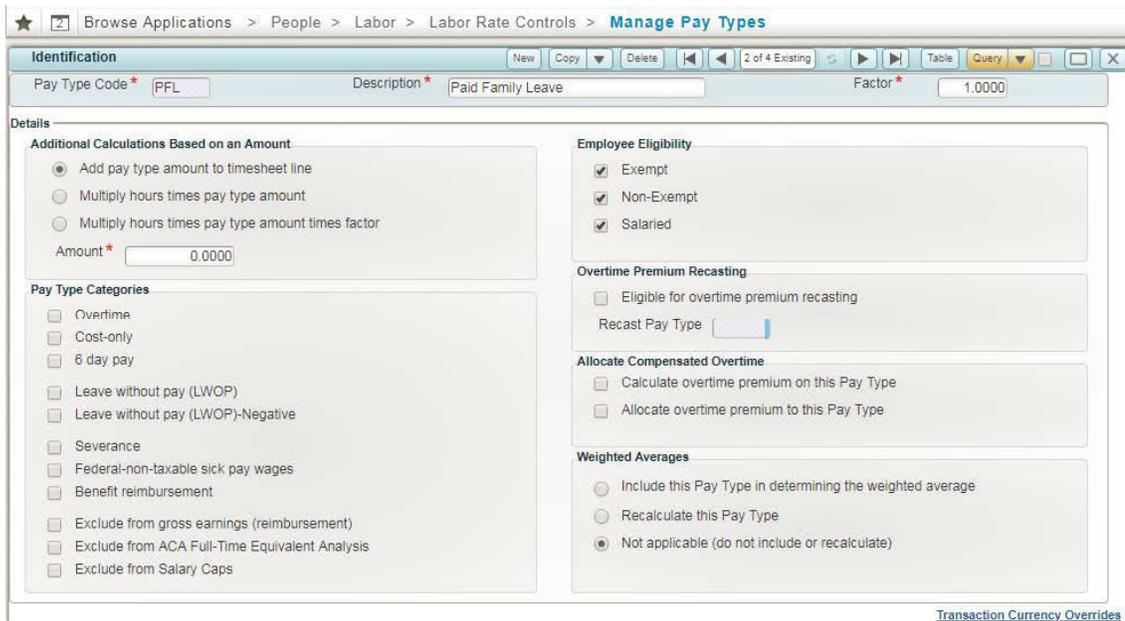
For example, the employee has the following:

- Paid Family Leave period is 01/01/2018 to 04/13/18.
- Timesheet frequency is semi-monthly.

A timesheet is entered or imported in April 2018 with a date of 04/15/18, but no timesheet line dates to indicate what day each charge was incurred. Without timesheet line dates, Costpoint will assume the timesheet includes the entire timesheet period. Therefore, it will assume the timesheet may include hours charged between 04/01/18 and 04/13/18 (the last 13 days of the employee's Paid Family Leave period).

Therefore, any charges to Paid Family Leave within this timesheet will pass validation.

7. The application will prevent users from importing a C-Correcting or D-Correcting timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates, the Reference Date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.
8. The application now has validations to prevent users from charging hours to an Account that's linked to a Paid Family Leave - leave type if the pay type is not set up as follows in the **Manage Pay Types** screen:
 - **Factor** — 1
 - **Additional Amount** — 0.00
 - **Overtime check box** — Unchecked
 - **Cost-only check box** — Unchecked
 - **Leave Without Pay (LWOP) check box** — Unchecked
 - **Leave Without Pay (LWOP) Negative check box** — Unchecked
 - **Severance check box** — Unchecked
 - **Eligible for overtime premium recasting check box** — Unchecked
 - **Allocate overtime premium to this Pay Type check box** — Unchecked
 - **Weighted Averages option** — Not Applicable (do not include or recalculate)



Manage Leave Codes (LDMLVTAB)

The **Compute Method** drop-down list displays a new option, **F-Block Grant on Paid Family Leave Accrual Date**, which is used specifically for only leave types that are flagged as **Use for Paid Family Leave**.

Manage Leave Types (LDMLVTP)

- A new **Use for Paid Parental/Family Leave** check box in the **Details** group box allows you to indicate that the leave type will be used to track paid family or paid parental leave.
- A new **Paid Family Leave Pay Type** field to the **Details** group box allows you to select the pay type to be used to adjust Paid Family Leave labor cost for Salaried employees.

Post Labor (LDPLDJ)

If you enable the Multicurrency functionality, the application will not process gains and losses for timesheet lines that have been adjusted by or generated for Paid Family Leave.

HotFix Requirements

This enhancement requires the following Costpoint 7.1.1 releases:

- PATCH3340
- Common lib - TSIMPORT (cp711_cmplib_TSIMPORT_005.zip)
- Common lib - LDMTIMELIB (cp711_cmplib_LDMTIMELIB_005.zip)

Application JAR Requirements

Domain	Module	Application ID	Application Name	Application File
People	Employee	LDMEINFO	Manage Employee Information	cp711_ldmeinfo_021.zip
People	Labor	LDMCTIME	Manage Correcting Timesheets	cp711_ldmctime_011.zip
People	Labor	LDMTIME	Manage Timesheets	cp711_ldmtime_017.zip

Domain	Module	Application ID	Application Name	Application File
People	Labor	LDPLDJ	Post Labor	cp711_ldpldj_013.zip
People	Labor	LDPRETRO	Create Retroactive Timesheet Adjustments	cp711_ldpretro_019.zip
People	Labor	LDMELV	Manage Employee Leave	cp711_ldmelv_001.zip
People	Labor	LDMLVTAB	Manage Leave Codes	cp711_ldmlvtab_004.zip
People	Labor	LDMLVTP	Manage Leave Types	cp711_ldmlvtp_005.zip
People	Labor	LDPAUTO	Apply Timesheet Adjustments in Batch Mode	cp711_ldpauto_014.zip
People	Labor	LDPCLHF	Compute Leave	cp711_ldpclhf_013.zip
People	Labor	LDPLVREC	Reconcile Leave Balances	cp711_ldplvrec_013.zip

Ability to Establish Limit for Year to Date (YTD) Leave Accrued Hours/Amount

Executive Order 13706 requires a parties that enter into government contracts with the Federal Government to provide covered employees with up to seven days of paid sick leave annually, including paid leave allowing for family care. To comply with the Executive Order, Costpoint now allows you to establish a limit to the hours/amount that an employee may accrue during the leave year.

The following Costpoint screen were updated to support this enhancement:

Compute Leave Accruals (LDPCLHF)

The application can now apply period-accrual and year-accrual ceilings based on Leave Type's **Accrual Ceiling Method** (in addition to existing period-balance and year-balance ceiling).

Manage Leave Codes (LDMLVTAB)

- The application now allows you to specify a ceiling that will limit the number of hours (or amount for leave types being tracked by amount) an employee may accrue during the leave year. Use the new **Year Accrual Ceiling** field to specify an annual accrual limit.
- The field label changed from "Leave Period Ceiling" to "Period Balance Ceiling."
- The field label changed from "Year Ceiling" to "Year Balance Ceiling."

Manage Leave Types (LDMLVTP)

- You can now whether or not a ceiling should be applied to the number of hours (or amount for leave types being tracked by amount) accrued for a given employee during the leave year and/or a given leave period. For this purpose, the screen provides a new **Accrual Ceiling Method** drop-down list with the following options: **Period and Year**, **Year**, and **No Ceiling**.
- The group box label changed from "Leave Balance Ceilings" to "Leave Ceilings."

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- The drop-down list label changed from “Ceiling Method” to “Balance Ceiling Method”
- You can now specify whether the Period and/or Anniversary Leave Year ceiling is applied before or after the period’s accrual is calculated. For this purpose, the screen provides the following **Ceiling Timing** group box options: **Before Accrual**, **After Accrual**, and **Not Applicable**.
- You can now specify whether excess leave is tracked as lost leave, transferred to an Excess Leave Type, or neither. For this purpose, the following changes were applied:
- The Balance **Ceiling Method** drop-down list no longer lists the **Lost Leave Tracking** option. The screen now contains a **Track as Lost Leave** check box.
- The screen contains new **Track as Lost Leave** and **Transfer Balance in Excess of Year Ceiling** check boxes for **Excess Leave Handling**.

Patch and System JAR Requirements

This enhancement requires Costpoint 7.1.1 PATCH3150

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
People	Leave	LDPCLHF	Compute Leave Accruals	cp711_ldpclhf_013.zip
People	Leave	LDMLVTAB	Manage Leave Codes	cp711_ldmlvtab_004.zip
People	Leave	LDMLVTP	Manage Leave Types	cp711_ldmlvtp_005.zip

Materials Management

Organization Security

Changes were made to the following screens in preparation for the future implementation of the Organization Security feature:

- Update Manufacturing Order Costs (PCMMCOST)
- Print Manufacturing Order Documentation (PCRMODC)
- Create MO Subcontractor Requisitions (PCMSCRQ)
- Manage MO Operations Completions (PCMCOMP)
- Manage MO Quality Control Inspection Results (PCMINSRQ)
- Manage Purchase Orders (POMMAIN)
- Manage Inventory Abbreviation Peggings (MRMIAPEG)

Note: These enhancements have no impact on current functionality. The functionalities of these updates/enhancements are not available until the full feature is released.

This feature ensures that proper user access is applied throughout all Materials applications.

Organization Security enhancement features the following:

- Validation of data entry as authorized for the logged-in user ID
- Filtering of existing records as authorized for the logged-in user ID
- Narrowing the search for records as authorized for the logged-in user ID
- Display of report information is limited to authorized data for the logged-in user ID

Note: The update for the Manage Purchase Orders (POMMAIN) screen requires PATCH3390.

Organization Security – Engineering Change Notices

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Engineering Change Notices (ECN) module. This feature ensures that correct user access is applied to the logged-in user ID in accessing parts and projects.

System JAR Requirements

This enhancement requires the Costpoint 7.1.1 System JAR 039 (cp711_sys_039.zip).

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
Materials	ECN	Manage Engineering Change Project Approvers	ECMPRAPP	cp711_ecmprapp_001.zip
Materials	ECN	Apply Engineering Change Notices	ECPINECN	cp711_ecpinecn_017.zip
Materials	ECN	View Engineering Change Notice Status	ECQECNST	cp711_ecqecnst_007.zip
Materials	ECN	Print Engineering Change Notice Impact Report	ECRIMPCT	cp711_ecrimpct_009.zip
Materials	ECN	Print Engineering Change Notice Travelers	ECRTRVLR	cp711_ecrtrvlr_006.zip

View Help About (SYMABOUT)

The Organization Security feature for the Engineering Change Notices (ECN) module has been registered on the View Help About (SYMABOUT) screen.

Manage Engineering Change Project Approvers (ECMPRAPP)

The following are the changes to this screen:

- Find/Query (Projects) — Costpoint now finds and filters existing records based on projects with owning organizations that are authorized for the logged-in user ID.
- Lookup (EC Project Approvers)
 - Project Abbreviation — Costpoint now narrows the search and displays only project abbreviations with owning organizations that are authorized for the logged-in user ID.
 - Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- Data Entry — If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have “Full” rights to the project’s owning organization in the user security group’s security profile.

Manage Engineering Change Notices (ECMECN)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your organization rights for the originator’s organization ID, and you can only see ECNs where you have rights to the same.
- Lookup
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.
 - Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- Data Entry
 - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have “Full” rights to the originator’s org ID and the project’s owning organization in the user security group’s security profile.
 - If approval process is required — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the originator’s org ID.
 - If all the users for the approval titles in the approval process are authorized for the originator’s org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the originator’s org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the originator’s org ID, Costpoint will display a warning message that not all of the approvers are authorized for the originator’s org ID and changes will still be saved.

Update Approved Engineering Change Notices (ECMAMAIN)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your organization rights for the originator’s organization ID, and you can only see ECNs where you have rights to the same.
- Lookup
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.

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- Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have “F”ull rights to the originator’s org ID and the project’s owning organization in the user security group’s security profile.
- If approval process is required — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the originator’s org ID.
 - If all the users for the approval titles in the approval process are authorized for the originator’s org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the originator’s org ID, Costpoint will display an error message.
- If at least one of the users for the approval titles in the approval process is authorized for the originator’s org ID, Costpoint will display a warning message that not all of the approvers are authorized for the originator’s org ID and changes will still be saved

Approve Engineering Change Notices (ECMAPPR)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your organization rights for the originator’s organization ID, and you can only see ECNs where you have rights to the same.
- Lookup
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.
 - Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- Update/Edit
 - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have “F”ull rights to the originator’s org ID and the project’s owning organization in the user security group’s security profile.
 - If approval process is required — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the originator’s org ID.
 - If all the users for the approval titles in the approval process are authorized for the originator’s org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the originator’s org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the originator’s org ID, Costpoint will display a warning message that not all of the approvers are authorized for the originator’s org ID and changes will still be saved.

Apply Engineering Change Notices (ECPINECN)

If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter an ECN, and organization with a user ID that is not authorized for the originator’s organization ID. In addition, if you do not have full rights to the originator organization for a particular ECN, Costpoint will only process records where your user ID is authorized for the originator’s organization ID linked to the ECN. ECNs without the originator’s ID will also not be processed, and Costpoint will display a message that says you are not authorized for the originator’s organization ID linked to the ECN.

View Engineering Change Notice Status (ECQECNST)

The following are changes to this screen:

- Find/Query — Costpoint now finds, filters, and lets you view existing records based on your organization rights for the originator's organization ID. However, Costpoint displays all ECNs regardless of the impacted projects linked to the ECNs.
- Lookup
 - ECN — Costpoint now narrows the search and displays only ECNs that are linked to the originator's organization that are authorized for the logged-in user ID.
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.

Print Engineering Change Notice Impact Report (ECRIMPCT)

If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter an ECN where your user ID is not authorized for the originator's organization ID linked to the ECN in the user security group's security profile.

Print Engineering Change Notice Travelers (ECRTRVLR)

If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter an ECN and organization with a user ID that is not authorized for the originator's organization ID linked to the ECN in the user security group's security profile. Costpoint will only display ECNs where you have full rights to the originator's organization ID and will not display records that do not have the originator's organization ID.

On the report, Costpoint will display a message that says you are not authorized for the originator's organization ID linked to the ECN.

Organization Security for Procurement Planning in Help About

The Features subtask now includes the Organization Security for Procurement Planning.

This enhancement requires PATCH5114.

Administration

Improved Multi-Company Visual Identifier

To easily identify the open company in Costpoint, its name now displays on the Global Menu header.

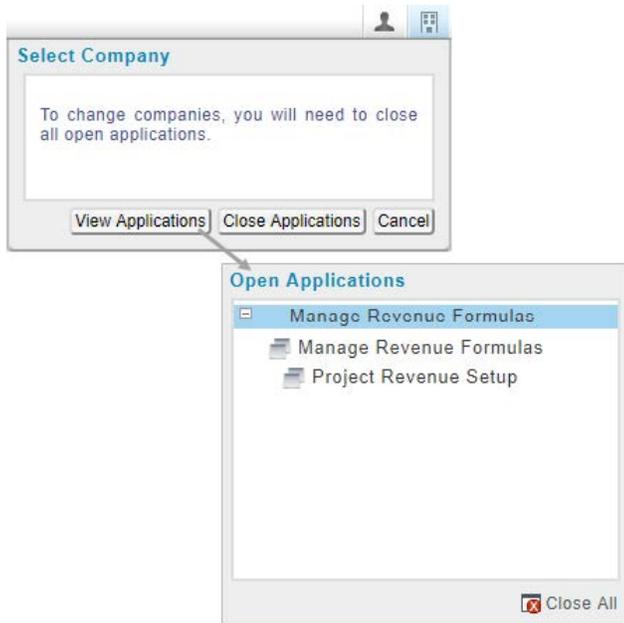
If the UI background color is defined in the Configure System Settings (SYMSETNG) application, then the specified color also displays in the background of the company name on the Global Menu header.

This enhancement requires cp711_sys_039.zip.

Improved Select Company Functionality

The Select Company menu is improved with more efficient functionality. Previously, if an application was open when you tried to select another company, you had to exit the menu to close all open applications before attempting to select a new company again.

Now, you can manage open applications within the Select Company dialog box. If applications are open, you have the option to close the applications or view a list of the open applications and then close them.



This enhancement requires cp711_sys_039.zip.

Reports & Analytics

There are no changes to the Reports & Analytics domain for this release.

Budgeting and Planning

Organizational Budgeting

There are no changes to Organizational Administration for this release.

Project Budgeting

Resource Planning

Budgeting & Planning includes a new resource planning application (Budget by Resource) that enables you to select a resource, or a team of resources, and then assign the selected resources to multiple budgets at the same time.

Functionality is currently limited to employee resources, but vendor employees will be added in a future release.

You can assemble team resources by name, generic staff, or text entry, or use new Advanced Search functionality to select resources according to skills or credentials, or other criteria, such as supervisor, organization ID, or GLC.

Other key abilities include:

- Save selected teams for future use.
- View assignment utilization and hours.
- View all projects to which a resource is assigned.
- Add, edit, or delete project assignments.
- Update Project Budgets/EACs with budget assignments.
- Commit assigned budgets. (Includes an optional default configuration setting.)

Configuration Settings

See “Budget By Resource Configuration Setting” below for more information.

Other Related Enhancements

The Advanced Search functionality described in these release notes was also added to the Staff Hours subtask of the following applications:

- Project Budgets/EACs
- Project Non-Backlog Budgets (NPI7)
- Project Proposals (NPI4)

In the above applications, the Advanced Search subtask only displays if the budget/EAC has a status of Working. In all other aspects, the feature performs as described in this document.

Budget Resource Planning

To open the application, click **Projects » Project Budgeting » Budget/EAC Processing » Budget By Resource**.

From the Budget By Resource screen, you can select individual resources by type or find resources using search criteria. To get started, you must first select the assignment date range for the budget period you want to plan.

Refer to the screen images below to learn more about using this planning tool.

Select a Resource by Type

Select the date range you want to use when entering resource hours, provided the budget performance period falls within this range.

Select for and select a previously saved team.

Search for a resource by type (Employee, Generic Staff, or Keyboard Entry).

Enter or Lookup the Resource ID.

Click Select Resource to add the resource. (Shown in table below.)

Search for resources using other criteria, such as skills or credentials. (See next page.)

These resources were selected from Resource Type and Resource ID.

ID Type	ID	Name	Assignment Utilization %	Assignment Hours	Status
Generic Staff	12	12	0.00%	0.0000	
Employee	10050	Zachaeus, Steven	0.02%	40.0000	

Select Resources Using Advanced Criteria, Modify Resource Hours, and Update Project Budgets/EACs

Click the **Advanced Search** subtask link to search for multiple employee resources using other criteria.

For any search category, enter the search criteria or use Lookup to select it.

Click the Add button for that category.

Added search criteria display. See below for additional details.

Click here to execute the search.

Selected Supervisors	Selected Organizations	Selected Labor Categories	Selected Skills	Selected Credentials
ALEXANDER	2.01.4120	ANAL	BENE ACCTNG/FIN	

After you click **Find Resources**, the results display in the Resources table.

Budgeting and Planning

Select the resources that meet your team requirements, or leave the top check box selected to add them all.

ID Type	ID	Name	Home Org ID	Default Acct ID	Default PLC
Employee	10032	Zephyr, Kim	2.01.4120		None
Employee	10033	Zephyr, Wayne	2.01.4120		None

Click here to add selected resources.

After you click **Add Resources**, selections are added to the Selected Resources table.

In this example, the table displays two resources selected using Resource Type and two selected using Advanced Search.

ID Type	ID	Name	Assignment Utilization %	Assignment Hours	Status
Generic Staff	12	12	0.00%	0.0000	
Employee	10050	Zacchaeus, Steven	0.02%	40.0000	
Employee	10032	Zephyr, Kim	0.00%	0.0000	
Employee	10033	Zephyr, Wayne	0.00%	0.0000	

Click this button to update Project Budgets/EACs for all selected resources. See "Budget/EAC Processing Rules" below.

Click here to plan hours for a selected resource.

After you click **Add/Edit/Delete Assignments**, you can update hours on existing budgets assignments, add new budgets, or delete budgets.

See the "Row Headings" section in the table below for more information.

Project ID *	Project Name	Saved Status	Source	10/28-11/24*00 (160/160)	11/25-12/29*00 (200/200)	12/30-01/26*01 (160/160)	01/27-02/23*01 (160/160)	02/24-03/23*01 (160/160)	03/24-04/19*01 (160/160)
10100	E-Commerce Application af		BUD	10.00	10.00	10.00	10.00	10.00	0.00
Assignment Total				10.00	10.00	10.00	10.00	10.00	0.00
Available Hours				160.00	200.00	160.00	160.00	160.00	160.00
Remaining Hours				150.00	190.00	150.00	150.00	160.00	

Click **Assign** to update Project Budgets/EACs for this individual resource. See "Budget/EAC Processing Rules" below.

For a complete listing and description of all the fields that display in the Add/Edit/Delete Assignments subtask, see the online help. The following is a partial list only.

Column/Row Heading	Description
Project ID	This non-editable field displays the Project ID number. The same Project ID may display multiple times if the resource is used under different account IDs, Org IDs, or PLCs.
Row Headings	The last three rows of the first column, which are colored yellow, display totals. The totals, which vary by column, always reflect the From/To period you selected in Assignment Range at the top of the screen.
Assignment Total	Assignment hours are the hours assigned to the resource within the selected assignment range. Assignment totals display in the following columns:

Column/Row Heading	Description
	<ul style="list-style-type: none"> ▪ Assignment Hours – Displays the total number of hours the resource has been assigned. ▪ Assignment Utilization % – Displays the total utilization % the resource has been assigned. ▪ Period (dated column) – Displays the total hours assigned to the resource for a specific period within the selected date range
Available Hours	<p>Available hours are the hours available to for resource within the selected assignment range.</p> <p>Available hour totals display in the following columns.</p> <ul style="list-style-type: none"> ▪ Assignment Hours – Displays the total number of hours the resource has available. ▪ Assignment Utilization % – Displays the % the assignment hours represent. ▪ Period (dated column) – Displays total hours the resource has available for a specific period within the selected date range.
Remaining Hours	<p>This row represents the difference between the Available Hours and the Assigned Hours, which is same calculation that is used to arrive at the Utilization %.</p>
Commit	<p>Select the check box to commit the budget when you click Assign or Assign All Resources.</p> <p>If the Resource Budget Commit Flag Default setting in Configuration Settings (MAM10) is selected, this check box is selected by default, and budgets with a Status of Working are automatically committed when you click Assign, but the check box can be edited in this screen.</p> <p>That version of the budget will not be set to Approved, and you must approve it from the Project Budgeting/EACs application.</p>
Assignment Start Date	<p>This column displays the assignment start date as entered in the Assignment Range date fields.</p>
Assignment End Date	<p>This column displays the assignment end date as entered in the Assignment Range date fields.</p>

Assign Resource Hours to Project Budgets/EACs

After you finish planning hours for the selected resource, you can save your changes and continue planning hours for other resources, or before proceeding, you can update staff hours in the Project Budgets/EACs application with the current resource assignments by clicking **Assign** on the Add/Edit/Delete Assignments subtask.

To save changes without assigning them, click  on the global menu and then click **Close** on the Add/Edit/Delete Assignments subtask.

The Add/Edit/Delete Assignments table and the Selected Resources table both include a status column that indicates whether or not a resource record has been saved.

Budgeting and Planning

After you finish planning hours for all resources, click Assign All Resources on the Selected Resources table to update process your changes and update staff hours in the Project Budgets/EACs application.

Budget/EAC Processing Rules

When the Project Budgets/EACs application is updated, the status of an existing budget changes, and if no budget already exists, one is created. Committing the budget also affects the status.

Depending on configuration, the **Commit** check box in the Add/Edit/Delete Assignment subtask will be either selected or clear by default. If it is not selected, the budget must be committed from the individual project budgets.

During processing, budgets are updated according to the following rules:

- If no budget exists, a new Working Budget is created. If the Commit check box was selected, an Incomplete Budget is created.
- If a Working Budget/EAC exists, it is updated. If the Commit check box was selected, an Incomplete Budget with same version number is created.
- If an Incomplete Budget/EAC exists, it is updated. If the Commit check box was selected, an Incomplete Budget with same version number is created. Budget & Planning first creates a Working Budget to add the entry, and if Commit is selected, it then creates a budget with a status of Incomplete with the same version number.
- If a Complete Budget/EAC exists and the Commit check box was selected, an Incomplete Budget/EAC is created. If the Commit check box was clear, a new Working budget/EAC is created with the same version number.
- If an Approved Budget/EAC exists and the Commit check box was selected, a new Working Budget/EAC is created. If the Commit check box was clear, a new Working budget/EAC is created with the same version number.

Save Teams

Prior to closing the application, you can use the Save Team functionality to save the selected group of resources as team, which you can select in future planning sessions.

To save a team, complete the following steps:

1. In the **Teams** field, enter a name for the team.
2. Click **Save Team**.

To search for a previously saved team, in the Teams field, click  to select the team using Lookup or enter the team name.

Advanced Search

The Advanced Search functionality which was developed for the Budget by Resource application was also added to the Staff Hours subtask of the following applications:

- Project Budgets/EACs
- Project Non-Backlog Budgets (NPI7)
- Project Proposals (NPI4)

In the above applications, the Advanced Search subtask only displays if the budget/EAC has a status of Working. In all other aspects, the feature performs as described in this document. See “Select Resources Using Advanced Criteria...” in the Resource Planning feature description to learn more about using this feature.

Budget By Resource Configuration Setting

A **Resource Budget Commit Flag** check box was added to the Projects tab of **Admin » Budget Administration » Administration Controls » Configuration Settings (MAM10)**. When this option is selected, the **Commit** check box in the Add/Edit/Delete Assignments subtask will be selected by default, but the user can change the status.

When this check box is selected, the budget is committed when the user clicks **Assign**, or clicks **Assign All Resources**. If it is not selected, the user must instead commit the budget from the individual project budgets.

Time and Expense

Time

There are no updates in this area.

Expense

There are no updates in this area.

Configuration

There are no updates in this area.

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