

Deltak Costpoint HotFix Readme

Release Date: December 29, 2016

Approval Workflow (WFA)

The Approval Workflow feature enables you to create, define, and run approval workflows for any application and result set in Costpoint. With this feature, you can do the following:

- Design multilevel sequential or parallel routing of approval steps.
- Implement conditions on individual approval steps.
- Set up approvers who will be allowed to initiate and perform the approval steps. Approvers are role-based, and a role can contain Costpoint users and/or security groups.
- Escalate or delegate approval to a different role either manually or by setting a time for the completion of the approval steps.
- Reject approval steps or the whole approval workflow.
- Receive email notifications with link to the screen for approval.
- View complete audit information of the approval workflow.

To support this enhancement, Costpoint framework has been updated, and three new applications have been created. There is also a new button (**Approval**) that displays on the application toolbar for screens with approval workflows defined.

Approval Roles (WFMAROLE)

Use this new screen to enter the roles and associated users for your approval workflows. Only roles that exist on this screen can be assigned to execute the approval steps.

It is important that users associated with the roles are correctly set up on the Manage Users screen. These users must be configured to receive messages through email so they get notified once activities are routed to them.

There are two types of approval roles:

- **Regular** — This is a group of users or users groups. You can enter or modify a regular role on this screen and assign users and/or user groups to it.
- **Built-In** — This is a pre-defined role and cannot be modified or deleted. The built-in roles are **Project Manager**, **Employee Manager**, and **Buyer**.

To access this screen, go to **Administration » Workflow » Approval Workflow » Approval Roles**.

Reject Codes (WFMARJCD)

Use this new screen to enter codes for rejecting approval workflows. Codes on this screen can be selected on the Approval Workflow Models screen.

To access this screen, go to **Administration » Workflow » Approval Workflow » Reject Codes**.

Approval Workflow Models (WFMAPPRL)

Use this new screen to define and design approval workflow models and assign them to specific Costpoint application screens. Only one workflow model may be set up for a specific application screen. You cannot set up multiple workflow models for the same application screen in the same database. In addition, a workflow model pertains to a single application screen only. You cannot incorporate multiple application screens into a single workflow.

You can define basic information about workflow models, approval steps or activities and their order, and conditions that apply to the workflows.

Before you set up this screen, you must first use the Approval Roles and Reject Codes screens. After the approval workflow model is defined, the associated application screen is extended with approval functionality.

Workflow models are not company-specific. If you have set up multiple companies in Costpoint, all companies can enter, view, and use the data on this screen.

To access this screen, go to **Administration » Workflow » Approval Workflow » Approval Workflow Models**.

New Approval Button, Approve Dialog Box

For applications that have an approval workflow defined and that is active, an **Approval** button is displayed on the application toolbar. Clicking this button brings up the Approve dialog box, where you can view the details of the approval step and perform different approval actions.

System JAR, Application JAR, and Other Requirements

The following table lists the Costpoint applications affected by this enhancement. It includes the required JAR version for each application.

Domain	Module	Application Name	Application ID	Application JAR
Administration	WF	Approval Roles	WFMAROLE	cp711_wfmarole_001.jar
Administration	WF	Reject Codes	WFMARJCD	cp711_wfmarjcd_001.jar
Administration	WF	Approval Workflow Models	WFMAPPRL	cp711_wfmapprl_001.jar

Additionally, the following are required for this update:

- cp711_sys_024.jar
- DeltakCostpoint711FrameworkUpdate024.exe
- jobmessageejb.jar
- PATCH3037
- PATCH3044
- PATCH3055
- PATCH3065
- PATCH3116
- PATCH3118
- PATCH7105
- PATCH7107
- PATCH7108
- PATCH7110
- PATCH7113
- PATCH7114

More information about this release is on the following page.

Custom Programs Affected:

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Customer Care at <http://support.deltek.com> before you install the update.

To Download the HotFix/Feature Update:

1. From Internet Explorer, go to <https://dsm.deltek.com>.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Customer Care Connect credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

To Install the HotFix/Feature Update:

Refer to the installation instructions posted on Deltek's Customer Care Connect site, <https://deltek.custhelp.com>.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.
- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.
- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

To Check to See if the HotFix is Installed:

1. Open the application that was updated.
2. Click **Help > About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

To Check to See if the Feature is Installed:

1. Click **Help > About Costpoint** from the Costpoint toolbar.
2. Open the Features subtask and click the Feature that was just installed.
3. Open the Applications subtask. Check the list of applications and their corresponding application jars and see if they are correct and have been successfully deployed (highlighted in green).
4. Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

More Information:

If you have any questions, please contact Deltek Customer Care at <https://support.deltek.com>.