




Deltek

Deltek Costpoint® 7.1.1

Supplier Portal: Phase 1

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Overview

Welcome to Deltek Costpoint 7.1.1 Release Notes. These release notes contain a summary of new enhancements available in this release.

The Supplier Portal is a new feature within Costpoint that will allow suppliers to quickly access purchase orders (PO) issued by buyers. This will also help companies to streamline communications between their purchasing departments and their suppliers, vendors, and subcontractors. The portal will be designed and developed in the following phases:

- Post-Award Management
- Invoice Management
- Pre-Award Management

For the first phase of the feature, suppliers and buyers can use the portal to communicate, attach documents, and enable email notifications to alert them when actions are needed to be done in the portal. The supplier portal will have dashparts that will give suppliers and buyers a view of purchase orders (PO) that require actions, as well as upcoming, late, or cancelled orders.

Costpoint customers need to have a license for the new Supplier Portal module to enable this feature. Once the feature is enabled, Costpoint prime customers need to provide their suppliers rights to access the Supplier Portal on the Manage Users (SYMUSR) screen.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 048 (cp711_sys_048.zip)
- PATCH3503
- PATCH3523
- PATCH5124
- PATCH5126
- PATCH7154

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 File
Materials	SP	Supplier Portal Dashboard	SPDSP	cp711_spdsp_002.zip
Materials	SP	Manage Supplier Actions	SPMSPACT	cp711_spmspact_002.zip
Administration	SY	Setup Company	SYPCOMP	cp711_sypcomp_024.zip
Administration	SY	Manage Users	SYMUSR	cp711_symusr_017.zip

Overview

Domain	Module	Application Name	Application ID	Application File
Materials	MM	Manage Purchase Orders	POMMAIN	cp711_pommain_042.zip
Materials	MM	Configure Purchasing Settings	POMSET	cp711_pomset_007.zip
Materials	MM	Manage Buyers	POMBUY	cp711_pombuy_007.zip
Materials	MM	Expedite Purchase Orders	POMEXPD	cp711_pomexpd_013.zip
Materials	MM	Create Blanket Purchase Order Releases	POMRELS	cp711_pomrels_024.zip
Materials	MM	View Purchase Orders	POQSTAT	cp711_poqstat_017.zip
Materials	MM	View Purchase Order Change Orders	POQCHNG	cp711_poqchng_009.zip
Materials	MM	Create Purchase Order Change Orders	POMCHNG	cp711_pomchng_016.zip
Materials	MM	Archive Purchase Orders	POPARCH	cp711_poparch_014.zip

Administration Domain

This section includes summaries of the changes made in relation with the Supplier Portal Phase I feature within the Costpoint Administration domain.

Manage Users (SYMUSR)

This application has two new fields:

- **Supplier Portal Vendor:** Use this field to indicate the supplier portal vendor ID linked to the user ID for a corresponding company.
- **Supplier Portal Vendor Name:** This field indicates the supplier portal vendor name corresponding to the vendor ID linked to the user ID for a corresponding company.

You can use these new fields to retrieve the appropriate purchase orders (PO) when loading the Supplier Portal dashboard (SPDSP) application.

These fields are visible only to users who are licensed for Supplier Portal.

Set Up Company (SYPCOMP)

This application copies the values of the new check boxes on the Configure Purchasing Settings screen, **Email Notification** and **Allow Edit** in the **Supplier Portal** group box, from the original company when you create a new company from an existing company.

View Help About (SYMABOUT)

The Features subtask of the View Help About (SYMABOUT) screen now includes this feature.

Materials Domain

This section includes summaries of the changes made in relation with the Supplier Portal Phase I feature within the Costpoint Materials domain.

Supplier Portal Dashboard (SPDSP)

This is a new application (**Materials » Supplier Portal » Dashboards/Actions » Supplier Portal Dashboard**) that suppliers can use to see a snapshot of and/or update information regarding their purchase orders (PO).

Suppliers can access the portal via the Costpoint login screen. Costpoint prime customer will provide them with login credentials such as a user ID tied to a vendor ID, which in turn, is tied to applicable POs. This screen is under the new Supplier Portal module of the Materials domain and requires a license to access it.

Note: Supplier Portal users do not have to have Costpoint installed.

Upon login, suppliers will see the dashboard screen with information for the following five (5) dashparts:

- **Pending Supplier Action (across Purchase Orders):** Costpoint automatically populates this dashpart with bars that indicate the number of PO lines (across multiple POs) in states that need supplier action. You can click the bar hyperlink to go to the Manage Supplier Actions (SPMSPACT) screen where the corresponding PO/PO lines are loaded. You can select whether to display or hide any of the bars on the dashpart.
- **Past Due Deliveries:** Costpoint automatically populates this dashpart with bars that indicate the number of days that the supplier is late in fulfilling the PO line order. You can click the bar hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded. By default, the ranges for this dashpart have been set to increments of 10 (for example, 10, 20, and 30, respectively, for ranges 1–3). You can set the ranges by clicking **Parameters** from the breadcrumb trail (**Materials » Supplier Portal » Dashboards/Actions » Supplier Portal Dashboard » Parameters » Reports**) and define up to 10 ranges for this dashpart. Costpoint will only display those that have been defined, and you have an option to hide this dashpart.
- **Upcoming Deliveries:** Costpoint automatically populates this dashpart with bars that indicate upcoming deliveries so that the supplier can take the necessary actions to ensure on-time delivery. You can click the bar hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded. By default, the ranges for this dashpart have been set to increments of 5, 10, and 20, respectively, for ranges 1–3. You can set the ranges by clicking **Parameters** from the breadcrumb trail (**Materials » Supplier Portal » Dashboards/Actions » Supplier Portal Dashboard » Parameters » Reports**) and define up to 10 ranges for this dashpart. Costpoint will only display those that have been defined, and you have an option to hide this dashpart.
- **Pending Supplier Action (by Purchase Order):** This dashpart displays a list of POs that have at least one (1) PO line or delivery schedule line with pending supplier action. You can click the PO hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded for the selected PO.
- **Open Purchase Order:** This dashpart displays a list of POs that have at least one open PO line, regardless of the **Last Action** value. You can click the PO hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded for the selected PO.

The list of POs included in the dashparts is based on the following query conditions:

- PO company matches that of the logged-in user.
- PO supplier ID matches that of the logged-in user.
- PO line/delivery line action is not blank and based on current **Action**.
- PO line status is Open.
- (New Orders) PO header Released Date ≤ Current Date.

From the dashboard, suppliers can click the hyperlink to go to the particular PO/line/delivery schedule line, and take the necessary action on the Manage Supplier Actions (SPMSPACT) screen.

Suppliers can also add notes, via this portal, to save communications with the buyer.

Manage Supplier Actions (SPMSPACT)

This is a new application (**Materials » Supplier Portal » Dashboards/Actions » Manage Supplier Actions**) that suppliers will be automatically taken to when they click the Supplier Portal dashboard bars. This screen is under the new Supplier Portal module of the Materials domain and requires a license to access it.

- Pending Supplier Action (across Purchase Orders)
 - New Orders: If you click the **New Orders** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#). If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If a delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - Change Requests: If you click the **Change Requests** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#). If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - Change Request Rejected: If you click the **Change Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#). If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - Cancel Request: If you click the **Cancel Request** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#). If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along

- with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- **Cancel Request Rejected:** If you click the **Cancel Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#). If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - **Backorder Request Accepted:** If you click the **Backorder Request Accepted** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#) (across multiple POs). This means that the buyer has accepted the request for a PO line or delivery schedule line to be put on backorder due to fulfillment issues. This is for information purposes only.
 - **Backorder Request Rejected:** If you click the **Backorder Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#) (across multiple POs). This means that the buyer has rejected the request for a PO line or delivery schedule line to be put on backorder due to fulfillment issues. The supplier must review and either acknowledge the rejection, or take further action.
 - **Substitution Request Accepted:** If you click the **Substitution Request Accepted** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#) (across multiple POs). This means that the buyer has accepted the request made by the vendor to supply a different part as a replacement for the original PO line part. The supplier can then ship the part agreed.
 - **Substitution Request Rejected:** If you click the **Substitution Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the [set query conditions](#) (across multiple POs). This means that the buyer has rejected the request made by the vendor to supply a different part as a replacement for the original PO line part. The supplier must review and either acknowledge the rejection, or take further action.
 - **Pending Supplier Action (by Purchase Order):** If this screen is opened by selecting a row from the list of POs in the Pending Suppliers Action (by Purchase Order) dashboard option, Costpoint loads all PO lines for the selected PO having one of the following actions:
 - Backorder Request Accepted by Buyer
 - Backorder Request Rejected by Buyer
 - Cancel Request by Buyer
 - Cancel Request Rejected by Buyer
 - Change Request by Buyer
 - Change Request Rejected by Buyer
 - Substitution Request Accepted by Buyer

- Substitution Request Rejected by Buyer
- Pending Supplier Acknowledgment
- Updated by Buyer
- Change Order – Pending Supplier Acknowledgment

Note: The **Change Order – Pending Supplier Acknowledgment** action is not available in the drop-down list. The system automatically inserts this action when the buyer implements the changes via the **Implement Action Changes** button at the PO header level, after first manually creating a change order.

This is also automatically inserted by the system when the buyer manually creates a change order (via the Create Purchase Order Change Orders screen) and manually updates the order quantity/amount or due date on a PO line or delivery schedule. This only applies to those PO lines (or delivery schedule lines) that have been modified after creating the change order.

Note: The **Updated by Buyer** action is not available in the drop-down list. The system automatically inserts this action when the buyer implements the changes via the **Implement Action Changes** button at the PO header level, without first manually creating a change order.

This is also automatically inserted by the system when the buyer manually changes the order quantity, amount, or due date on a PO line or delivery schedule without first creating a change order.

If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line along with quantities and due dates from the delivery schedule. If a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

- Past Due Deliveries: This screen opens to the default settings discussed below. For more information on customizing the ranges, please see dashparts information as discussed on the [Supplier Portal Dashboard](#) section.
 - If this screen is opened by selecting ≤ 10 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, [Current Date - Due Date] ≤ 10 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - If this screen is opened by selecting 12–20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, 10 < [Current Date - Due Date] ≤ 20 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

- will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- If this screen is opened by selecting > 20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, $20 < [\text{Current Date} - \text{Due Date}] \leq 30$ days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - If this screen is opened by selecting > 30 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, $[\text{Current Date} - \text{Due Date}] > 30$ days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - Upcoming Deliveries: This screen opens to the default settings discussed below. For more information on customizing the ranges, please see dashparts information as discussed on the [Supplier Portal Dashboard](#) section.
 - ≤ 5 Days: If this screen is opened by selecting ≤ 5 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, $[\text{Due Date} - \text{Current Date}] \leq 5$ days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - 6–10 Days: If this screen is opened by selecting 6–10 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, $6 < [\text{Due Date} - \text{Current Date}] \leq 10$ days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - 11–20 Days: If this screen is opened by selecting 11–20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, 10

- < [Due Date - Current Date] ≤ 20 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- > 20 Days: If this screen is opened by selecting >20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, [Due Date - Current Date] >20 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - Open Purchase Orders: If this screen is opened by selecting a row from the list of POs in the Open Purchase Orders dashboard option, Costpoint loads all PO lines with an open quantity and an order quantity greater than zero (0) for the selected PO, regardless of action.

If the PO line has zero order quantity, Costpoint loads the PO line with greater than zero (0) open amount.

If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line along with quantities and due dates from the delivery schedule.

If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - Email Alerts: If a buyer selected the **Supplier Portal Email Notification** check box on the Manage Purchase Orders screen, Costpoint automatically generates an email notification to the buyer. Email notifications are sent to the email address associated with the PO header buyer's employee ID (this email address is the same email address saved on the Manage Employee Information screen) whenever a supplier saves a new action information on the PO line or delivery schedule line. If a supplier changed and saved multiple POs with the same buyer, PO, or delivery lines, Costpoint sends one (1) email per PO. The same is true for multiple POs with different buyers. Included in the email notification is the link to the PO that takes the buyer directly to the Manage Buyer Actions screen to automatically query the referenced PO.
 - The Action History subtask shows the history of any action change along with the communication notes. Costpoint displays all rows associated with the particular PO, release, and PO/delivery line regardless of the change order number. Information in this section based on the changes made to the Action Information tab on the Manage Purchase Orders screen.

Costpoint only uploads POs with vendor IDs that match the vendor ID on the company into which the user is logged into.

The following action options are available to suppliers:

- Acknowledged by Supplier: This option indicates that the PO line order quantity/amount and due date are acceptable.
- Change Request by Supplier: This option indicates that there is a proposed change to the PO line quantity/amount or due dates.
- Change Request Accepted by Supplier: This option indicates that the supplier has accepted the change proposed by the buyer regarding the PO line quantity/amount or due dates.
- Change Request Rejected by Supplier: This option indicates that the supplier has rejected the change proposed by the buyer regarding the PO line quantity/amount or due dates.
- Cancel Request by Supplier: This option indicates that the supplier has requested a PO line order cancellation.
- Cancel Request Accepted by Supplier: This option indicates that the supplier has accepted a PO line order cancellation request made by the buyer.
- Cancel Request Rejected by Supplier: This option indicates that the supplier has rejected a PO line order cancellation request made by the buyer.
- Backorder Request by Supplier: This option indicates that the supplier has requested a backorder for a PO line order due to fulfillment issues.
- Substitution Request by Supplier: This option indicates that the supplier has requested permission to substitute a different part other than what was on the PO line.

Manage Purchase Orders (POMMAIN)

The following are the changes to this screen:

- This screen now has the **Implement Action Changes** button to implement changes proposed through the supplier portal. This button is visible only to users who are licensed for Supplier Portal.
 - Clicking this button, without creating a new change order, updates all qualified PO and delivery schedule lines with the latest proposed quantity, amount, and due date. The updates are reflected in the **Action** field as **Updated by Buyer**, and the supplier can then acknowledge the updates, if necessary.
 - Depending on the company's system, if a change order is needed before implementing action changes, the buyer creates a change order on the Create Purchase Order Change Orders screen, and before clicking **Implement Action Changes** by querying the PO on the Manage Purchase Orders screen. This action updates all PO and delivery schedule lines with the latest proposed quantity, amount, and due date. The updates are reflected in the **Action** field as **Change Order – Pending Supplier Acknowledgment**, and the supplier can then acknowledge the updates.
 - The buyer can also manually make the changes to the PO or delivery schedule lines as per usual. The updates are reflected in the **Action** field as **Updated by Buyer**, and the supplier can then acknowledge the updates.
- If you create a new release order by clicking the **Create Blanket PO Release**, the Action Information tab will behave similar to the logic of dealing with a new PO.
- If the user is licensed for Supplier Portal, and the **Released to Vendor** check box is selected:
 - All PO lines and associated delivery schedule lines (if any) are accessible in the portal.

- All PO lines that currently have blank values in the **Last Action** field are loaded with **New Action = Pending Supplier Acknowledgment**. Delivery schedules associated with the PO line and with a blank **New Action** field will also be updated with the **New Action** value.
- Additional PO lines will have **Pending Supplier Acknowledgment** as **New Action** default.
- Additional delivery schedule row will have **Pending Supplier Acknowledgment** as **New Action** default.
- If the user is licensed for Supplier Portal, and the **Released to Vendor** check box is not selected:
 - The **New Action** field is enabled for PO lines with associated delivery schedule rows and if the current value of the PO line **Last Action** is blank. The **New Action** field is disabled for the associated delivery schedule rows of the PO line.

Note: The PO line **New Action** field is always enabled if there are no delivery schedule lines associated with the PO line.

- Manually releasing a PO line to the supplier by changing the **New Action** from blank to **Pending Supplier Acknowledgment**, automatically, releases as well all associated delivery schedule rows for the PO line.
- An additional PO line will have a blank **New Action** field, and the buyer has the option to release the PO line (together with any associated new delivery schedule lines with a disabled **New Action** field) to the supplier by selecting **New Action = Pending Supplier Acknowledgment**.
- An additional delivery schedule row for a previously released PO line will have **New Action = Pending Supplier Acknowledgment**. An additional delivery schedule row for an unreleased PO line will have a disabled **New Action** field.
- This screen has a new **Email Address** field to store the email address of the contact to whom supplier portal-related alerts will be sent.
- This screen has a new **Supplier Portal Email Notification** check box for sending email alerts to the supplier whenever there are portal information changes made by the buyer. This check box initially defaults its value from the **Supplier Portal Email Notification** check box associated with the PO header buyer. If the **Allow Edit** check box is selected on the Configure Purchasing Settings screen, then the **Supplier Portal Email Notification** check box on the PO header is editable; otherwise, **Supplier Portal Email Notification** is disabled. If the **Supplier Portal Email Notification** check box is not selected, the supplier will not receive email alerts.

This option is only available to users who are licensed for Supplier Portal.

- This screen has a new Action Information tab (PO line and Delivery Schedule subtask) with fields that can be updated by the buyer and allow faster communication with the supplier.
 - Changes made on this tab are saved in the Action History subtask and made available to suppliers in the Supplier Portal where suppliers can then take the necessary action. The last action taken and the most recent proposed changes are reflected on the PO line (PO/Rise/PO line/delivery schedule line).
- This option is only available to users who are licensed for Supplier Portal.
- On the **New Action** field drop-down list, the buyer can select standard actions to take in relation to the supplier portal. In addition, the buyer can enter proposed changes in quantity, amount, or due dates, along with notes entered.

- This screen has a new Action History subtask linked to the PO line/delivery schedule to access action history information for the PO/rise/PO line/delivery schedule line. This option is only available to users who are licensed for Supplier Portal.

Configure Purchasing Settings (POMSET)

This screen has a new **Supplier Portal** group box, with **Email Notification** and **Allow Edit** check boxes, which can be used to enable sending of email alerts between the supplier and the buyer whenever there are action changes related to the POs in the supplier portal. The value of the **Email Notification** check box from this screen is reflected on new buyers created on the Manage Buyers screen. The value of the **Allow Edit** check box from this screen indicates whether the supplier portal email notification is editable or non-editable on the Manage Buyers and Manage Purchase Orders screens.

These fields are visible only to users who are licensed for Supplier Portal.

Manage Buyers (POMBUY)

This screen has a new **Supplier Portal** group box with an **Email Notification** check box. The value of this check box initially defaults to the **Email Notification** check box on the Configure Purchasing Settings screen, and this applies to new POs and buyers. If the **Allow Edit** check box is selected on the Configure Purchasing Settings screen, then the **Email Notification** check box is editable; otherwise, **Email Notification** is disabled.

This field is visible only to users who are licensed for Supplier Portal.

Create Blanket Purchase Order Releases (POMRELS)

The child table window and the Delivery Schedule subtask now have the Action Information tab to indicate that the release line is ready for the supplier to view. The tab has two fields, **Action** and **Notes**. For a new release where the line is not yet ready for the supplier, the **Action** field defaults to blank. The buyer can later change this to **Pending Supplier Acknowledgment** when it is ready. If the buyer leaves the **Action** field blank, this can be changed on the Manage Purchase Orders or on the Expedite Purchase Orders screen. In the **Notes** field, the buyer can enter any free-form text to communicate to the supplier.

You can review and access all changes you make on this tab through the Action History subtask on the PO line and Delivery Schedule subtask across Costpoint.

Expedite Purchase Orders (POMEXPD)

The following are the changes to this screen:

- This screen has a new Action Information tab (PO line and Delivery Schedule subtask) with fields that can be updated by the buyer and allow faster communication with the supplier.
- Changes made on this tab are saved in the Action History subtask and made available to suppliers in the Supplier Portal where suppliers can then take the necessary action. The last action taken and the most recent proposed changes are reflected the PO line (PO/Rise/PO line/delivery schedule line). This option is only available if you are licensed for Supplier Portal.
- On the **New Action** field drop-down list, the buyer can select standard actions to take in relation to the supplier portal. In addition, the buyer can enter proposed changes in quantity, amount, or due dates, along with notes entered.
- This screen has a new Action History subtask to allow access to the action history information for the PO/Rise/PO line/delivery schedule line.

Create Purchase Order Change Orders (POMCHNG)

This application now copies supplier portal-related information to the history table whenever a change order is created, and the screen option to **Save Existing Change Order to History File** is selected.

View Purchase Order Status (POQSTAT)

This screen has a new Action History subtask that shows the history of any action change along with the communication notes. Costpoint displays all rows associated with the particular PO, release, and PO/delivery line regardless of the change order number. The information in this section is based on the changes made to the Action Information tab of the Manage Purchase Orders screen.

View Purchase Order Change Orders (POQCHNG)

This screen has several new Action History subtasks that allow access to the action history information associated with the current or old change order for the PO/Release/PO line/delivery schedule line on the following:

- Current CO Line
- Old CO Line
- Current CO Line/Delivery Schedule
- Old CO Line/Delivery Schedule
- Compare Cos (Current CO Line)
- Compare Cos (Old CO Line)
- Compare Cos (Current CO Line/Delivery Schedule)
- Compare Cos (Old CO Line/Delivery Schedule)

Note: The Action History subtask is visible only to users who are licensed for Supplier Portal.

Archive Purchase Orders (POPARCH)

This screen has a new **PO Line Action History** check box to copy the action history information of the PO lines to the corresponding tables.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.



About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com