

# Deltek Costpoint HotFix Readme

*Released: June 29, 2017*

## PO Line Vendor Classification Updates

PO Line Vendor Classification Updates provides the ability for users to add vendor classifications at the purchase order (PO) line level. This feature is also part of a compliance requirement for reporting purposes on the various vendor classifications under the North American Industry Classification System (NAICS). NAICS classifies business establishments with the purpose of collecting, analyzing, and publishing statistical data related to the U.S. economy. The NAICS industry codes define establishments based on the activities in which they are primarily engaged. Examples of classifications are business size (large, small, non-profit, and foreign/other) and vendor classifications (woman-owned, veteran-owned, and others).

Adding vendor classifications at the line level helps provide an accurate report based on vendor status at the time the new line is added.

For this enhancement, the following Costpoint screens now include the corresponding updates:

### Manage Purchase Orders (POMMAIN)

- The application now has a new tab, Vendor Classifications, to display the purchase order (PO) line vendor classification values. In addition, the logic of the application has been changed to save and display the current values of the vendor classification when a PO line is first created.
- The **Business Size** field has been moved from the Other Info tab to the Vendor Classifications tab. For a new PO line, if the line part has a defined industry class (ITEM.IND\_CLASS\_CD), then this defaults and loads the corresponding **Business Size** field, as defined in Manage Vendor/Size by Industry Classification (VEND\_IND\_CLASS table) for PO vendor. You can manually edit the PO line **Industry Class** and **Business Size** fields. If a previously saved PO line is edited, do not change the previously saved vendor classification on the PO line unless the vendor is changed on the PO header, in which case update the PO line with classification values corresponding to the new vendor.
- When a previously saved PO line is edited, do not change previously saved vendor classification on the PO line unless you change the vendor on the PO header, in which case, update the PO line with classification values corresponding to the new vendor.
- When you add a new PO line to an existing PO, Costpoint loads the current vendor classification values to that PO line.



It is possible that classification values for the same vendor may be different between PO lines.

- 
- When you create a new release or subcontractor agreement release from a blanket order, Costpoint copies the values of business size from the blanket line, but loads the current vendor classification values to the new release PO line.

### Create Blanket Purchase Order Releases (POMRELS)

- The application now has a new tab, Vendor Classifications, to display the purchase order (PO) line vendor classification values.
- When you create a new release from a blanket order, Costpoint copies the values of the business size from the blanket line, but loads the current vendor classification values to the new release PO line.

## Create Purchase Order Change Orders (POMCHNG)

When you create a new change order, Costpoint copies the vendor classification information from PO\_LN table to corresponding columns in PO\_LN\_CHNG table.

## Archive Purchase Order (POPARCH)

When you archive a PO line, Costpoint copies the vendor classification information from the PO\_LN table to corresponding columns in PO\_LN\_HS table.

## Print Purchase Order Activity Report (PORACTV)

- The **Use PO Line Business Size** check box now defaults to selected, and if cleared, Costpoint displays a warning message.
- The calculation always uses PO line values.

## View Purchase Order Status (POQSTAT)

The application now displays the values of the vendor classification as saved on the PO line. In addition, the Vendor Classifications fields have been changed to check boxes on the new Vendor Classifications tab, with the addition of the **Business Size** field, which has been moved from Other Info tab to the new tab.

## Create Purchase Orders (PPPGPO)

- When you create a new PO, Costpoint loads the current PO vendor classification values to the corresponding columns on the newly created PO lines, with the exception of business size. The business size value comes from the value saved on the Assign PO line subtask (Apply PO Info to Purchase Requisitions by Line) that is used for creating this PO line.
- When you create a new release against an existing Blanket PO, Costpoint loads the current vendor classification values to the new release PO line, with the exception of business size. The business size value comes from the value saved on the Assign PO line subtask (Apply PO Info to Purchase Requisitions by Line) that is used for creating this PO line.
- When you create a new PO line against an existing standard PO, Costpoint loads the current values of the PO vendor classification to corresponding columns on the newly created PO lines, with the exception of business size. The business size value comes from the value saved on the Assign PO line subtask (Apply PO Info to Purchase Requisitions by Line) that is used for creating this PO line.

## Import Purchase Orders (AOPUTLPO)

- When you create a new PO, Costpoint loads the current values of the PO vendor classification to corresponding columns on the newly created PO lines, with the exception of business size information.
- The business size value varies for non-release and release POs:
  - For non-release POs – On new line or when PO\_HDR.VEND or the PO\_LN. IND\_CLASS\_CD has changed, the system must determine the PO line business size. If the IND\_CLASS\_CD is not null, lookup VEND\_IND\_CLASS for that PO\_LN. Use PO\_HDR. VEND\_ID and PO\_LN. IND\_CLASS\_CD. If a row is found, load VEND\_IND\_CLASS .S\_CL\_SM\_BUS\_CD to PO\_LN. S\_CL\_SM\_BUS\_CD, If a row is not found or IND\_CLASS\_CD is null, load the value from the VEND table.
  - For release POs – Costpoint copies the business size from the blanket PO line.
- When you create a new release against an existing Blanket PO, Costpoint loads the current vendor classification values to the new release PO line, with the exception of business size information, which is copied from the blanket line.
- When you create a new PO line against an existing standard PO, Costpoint loads the current values of the vendor classification from the PO header to corresponding PO Vendor Classification columns

on the newly created PO lines, with the exception of business size information. Business Size loads from the IND\_CLASS\_CD table. If not found there, this then loads value from VEND table.

- When a previously saved PO line is edited, do not change previously saved vendor classification on the PO line, unless the vendor is changed on the PO header, in which case update the PO line with vendor classification values corresponding to the new vendor.

## Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 030 (cp711\_sys\_030.zip)
- PATCH3170
- PATCH3195
- PATCH3202

## Application JAR Requirements

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

Domain	Module	Application Name	Application ID	Application File
Materials	PO	Manage Purchase Orders	POMMAIN	cp711_pommain_030.zip
Materials	PO	Create Blanket Purchase Order Releases	POMRELS	cp711_pomrels_017.zip
Materials	PO	Create Purchase Order Change Orders	POMCHNG	cp711_pomchng_011.zip
Materials	PO	Archive Purchase Orders	POPARCH	cp711_poparch_009.zip
Materials	PO	Print Purchase Order Activity Report	PORACTV	cp711_poractiv_006.zip
Materials	PO	View Purchase Order Status	POQSTAT	cp711_poqstat_013.zip
Materials	PP	Create Purchase Orders	PPPGPO	cp711_pppgpo_018.zip
Materials	PO	Import Purchase Orders	AOPUTLPO	cp711_aoputlpo_018.zip

More information about this release is on the following page.

## Custom Programs Affected:

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

## To Download the HotFix 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 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.

## More Information:

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