

# Deltak Costpoint HotFix Readme

**Release Date: March 30, 2017**

## Role-Based Dashboards

Costpoint now delivers dashboard content for specific roles through a new module (Dashboards) which is available in the Reports & Analytics domain. This allows you to view information you rely on most, displayed either in chart or table format, without having to navigate to individual modules or reports.

A role-based dashboard has two tabs: Parameters and Reports. You configure your dashboard through the Parameters tab, while you use the Reports tab to view the dashparts that are selected with the configured parameters.



The Global Menu items (**File**, **Line**, **Options**, **Process**, and **Help**) are disabled, while only the **Refresh** icon is available on the Global Toolbar on the Reports tab view. To access options in the menu and toolbar, go to the Parameters tab.

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Each dashboard has several dashparts. The dashparts can pull data from Costpoint, Budgeting & Planning, or Time & Expense. If you are not licensed for Budgeting & Planning or Time & Expense, the dashparts that rely on information from these applications will not display on the dashboard.

Within the dashboards, you can perform the following actions:

- Set up which dashparts to display and in what order.
- Limit the number of records you want to display for some dashparts.
- Drill down from the dashpart to a screen in Costpoint, Budgeting & Planning, or Time & Expense (depending on your security rights).
- Access shortcut links to Costpoint Enterprise Reporting (CER) and Costpoint Analytics (if access is configured by your system administrator).

Because dashboard content depends on role-based security, each dashboard is customized to display information specific to a role.

Costpoint's Role-Based Dashboards enhancements will be released in multiple phases. In the past release, the Project Manager Dashboard was rolled out. In this release, the Organization Manager Dashboard is included.

## Organization Manager Dashboard (PJDOM)

If you are an organization manager, you can use this dashboard to view high-level information of your organization's financial status. You can view outstanding accounts receivables, open billing details, revenue, and modifications of the funded and contract values of projects associated with the organizations you have access to. You can also use this dashboard to see information on employees' labor utilization and indirect expenses of accounts linked to your organizations to help you analyze variances between budgeted and actual utilization and expenses.

You can limit the data that displays on the individual dashparts to specific organizations through the **Organization** field on the Parameters tab. Once you enter or select a valid organization in this field, the dashparts display data only for the specified organization and all levels below it.

The following dashparts are available on this dashboard:

- **AR Aging** — This is a stacked bar chart that displays the outstanding billed accounts receivables (AR) by project for a given aging range. Projects that display on the chart are only those associated with the organizations you have access to. When you hover over a bar segment on this chart, a tooltip displays the actual AR amount for that segment/project. When you click a segment, Costpoint opens the View

Receivables and Collections screen, where you can view the outstanding invoices for that specific segment/project.

- **Aged Open Billing Detail** — This is a stacked bar chart that displays the sum of transactions that have not been billed yet by project for a given aging range. Projects that display on the chart are only those associated with the organizations you have access to. When you hover over a bar segment on this chart, a tooltip displays the actual open billing amount for that segment/project. When you click a segment, Costpoint opens the Manage Open Billing Detail screen, where you can view the open billing transactions for that particular segment/project.
- **Projects Approaching Funding** — This is a horizontal bar chart that enables you to view the projects with revenue that is approaching a % threshold of the funded value of the contract. You can set the % threshold on the Parameters tab. Projects that display on the chart are only those associated with the organizations you have access to. When you hover over a bar segment on this chart, a tooltip displays the revenue value, funded value, and backlog for that segment/project. When you click a segment, Costpoint opens the Manage Modifications screen, where you can view not only funding modifications but also modifications to the signed value for that segment/project.
- **My Links** — This displays the list of links that are set up in your My Menu, so you have easy navigation to your most used areas in Costpoint.
- **Timesheet Status** — This is a pie chart that displays a breakdown of the timesheet statuses of employees that belong to the organizations you have access to. You can click a slice on this chart to open the Manage/Approve Timesheets screen, where you can view the timesheet details of employees you supervise.
- **Labor Utilization** — This is a numerical table that displays labor utilization of employees whose actual labor utilization differs from their budgeted labor utilization. The table includes information on actual utilization %, budget utilization %, and the variance between the two. Click an employee ID link on the table to open the Utilization Analysis (COL1,BOL1,POL1) screen, where you can view utilization information for the organizations you have access to.
- **Indirect Expenses** — This is a numerical table that displays indirect non-labor expenses of accounts with actual expenses greater than the budgeted expenses. The table includes information on actual and budgeted expenses, the variance between the two, and variance %. Click an account link on the table to open the Non-Labor Analysis (CON1,CON2,BON1,BON2,PON1) screen, where you can view indirect non-labor costs for the organizations you have access to.
- **Project Modifications** — This is a numerical table that displays the total funded and contract values of top-level projects that had modification updates and/or additions (at any project level) in the past “x” days. Projects that display on the chart are only those associated with the organizations you have access to. Click a project ID link on the table to open the Manage Modifications screen, where you can view all modifications for contract and funded values at or below the first project level.



The Timesheet Status dashpart displays only if you are licensed for Time & Expense, while Labor Utilization and Indirect Expenses display only if you have a valid license for Budgeting & Planning. These do not display by default. You have to manually enable these dashparts on the Parameters tab, or your system administrator can set them up to display automatically on your dashboard.

## System JAR and Application JAR Requirements

These enhancement require the following:

- Costpoint 7.1.1 System JAR 027 (cp711\_sys\_027.zip)
- cp711\_pjdom\_001.zip

## Accessing the Online Help

The **Help** menu is disabled on the Reports tab view. To access the online help, go to the Parameters tab and click **Help » Help** or press SHIFT+F1.

If you use Internet Explorer and the online help does not display correctly, you need to turn off Compatibility View for the browser. Click **Tools » Compatibility View settings**, and clear the **Display intranet sites in**

**Compatibility View** check box. Then refresh the browser. Make sure you remove deltek.com (if listed) from the Websites you have added to Compatibility View list.

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>.