Deltek Costpoint® 7.1.1

Release Notes: Contract Management

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Overview

Costpoint now provides additional contract management capabilities through the new Contract Management module available in the Projects domain. With this module, you can:

- Track opportunities within Costpoint and use this information to initiate a contract or a project.
- Track bid and proposal costs from the opportunity to a Costpoint project.
- Track organizational conflicts of interest (OCIs) and link them to opportunities, contracts, and/or projects.
- Manage contract or flow-down clauses between prime contractors and subcontractors.
- Manage customer, vendor, and employee information.
- Streamline the project initialization process.
- Track information from the beginning of the opportunity through contract closeout.

You can manually add opportunities to this module or import opportunity data from GovWin IQ.

In this limited availability (LA) release, the functionality to import opportunities from GovWin IQ is not yet available. GovWin IQ integration for Contract Management together with the new Import GovWin IQ Data screen will be rolled out in the general availability (GA) release.

Once you win the opportunity, you can create a contract and link it to the opportunity. You have the option to associate the contract to a Costpoint opportunity, and also create a contract for an opportunity that does not exist in your Costpoint database. You can create and monitor subcontract information and link subcontract records to contracts and projects.

Within the opportunities, contracts, and/or subcontracts screens, you have the ability to:

- Add activities and documents related to the opportunity, contract, and/or subcontract.
- Identify employees and other team members who will be working on the opportunity, contract, and/or subcontract.
- Create and/or update contract/subcontract modifications.
- Initialize projects to include information that already exists in the Contract Management module.
- View projects linked to the opportunity, contract, and/or subcontract.
- View and print a project status report (PSR).

Screens that you can use to set up and maintain overall settings for Contract Management are also available in this module.

For an overview demonstration of this feature, refer to the *Costpoint 7.1.1 Contract Management Overview* video, which you can view at https://help.deltek.com/Product/Costpoint/USS/Projects/ContractManagementOverview.

Patch and System JAR Requirements

This feature requires the following:

- Costpoint 7.1.1 System JAR 036 (cp711_sys_036.zip)
- Common library - CTLIB (cp711_cmnlib_CTLIB_001.zip)

- Common library - PJMASSADD (cp711_cmnlib_PJMASSADD_001.zip)

In addition, the following patches are required for this release:

- 3177
- 3197
- 3201
- 3205
- 3206
- 3209
- 3214
- 3215
- 3220
- 3222
- 3223
- 3233
- 3234
- 3236
- 3237
- 3244
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- 3297
- 3305
- 3315
- 3317
- 3318
- 3325
- 3328
- 3336
- 3352
- 5074
- 5078
- 5085
- 5102

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.

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMOPP	Manage Opportunities	cp711_ctmopp_001.zip
Projects	Contract Management	CTMCNTR	Manage Contracts	cp711_ctmcntr_001.zip
Projects	Contract Management	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_001.zip
Projects	Contract Management	CTQSUBC	View Subcontract Inquiry	cp711_ctqsubc_001.zip
Projects	Contract Management	CTMOCI	Manage Organizational Conflict of Interest (OCI)	cp711_ctmoci_001.zip
Projects	Contract Management	CTMCUST	Manage Contract Management Customer Info	cp711_ctmcust_001.zip

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMCUSTA	Approve Prospective Customers	cp711_ctmcusta_001.zip
Projects	Contract Management	CTMVEND	Manage Contract Management Vendor Info	cp711_ctmvend_001.zip
Projects	Contract Management	CTMVENDA	Approve Prospective Vendors	cp711_ctmvenda_001.zip
Projects	Contract Management	CTMEMPL	Manage Contract Management Employee Info	cp711_ctmempl_001.zip
Projects	Contract Management	CTMSETNG	Configure Contract Management Settings	cp711_ctmsetng_001.zip
Projects	Contract Management	CTMACTM	Manage Activity Methods	cp711_ctmactm_001.zip
Projects	Contract Management	CTMACTS	Manage Activity Subject	cp711_ctmacts_001.zip
Projects	Contract Management	CTMAGENC	Manage Agencies	cp711_ctmagenc_001.zip
Projects	Contract Management	CTMROLES	Manage Contract Management Roles	cp711_ctmroles_001.zip
Projects	Contract Management	CTMCNTVEH	Manage Contract Vehicles	cp711_ctmcntveh_001.zip
Projects	Contract Management	CTMDOCTP	Manage Document Types	cp711_ctmdoctp_001.zip
Projects	Contract Management	CTMNAICS	Manage NAICS Codes	cp711_ctmnaics_001.zip
Projects	Contract Management	CTMAGRTYPE	Manage Agreement Types	cp711_ctmagrtype_001.zip
Projects	Contract Management	CTMCNTDT	Manage Contract Date Types	cp711_ctmcntdt_001.zip
Projects	Contract Management	CTMCNTST	Manage Contract Status	cp711_ctmcntst_001.zip
Projects	Contract Management	CTMCNTYPE	Manage Contract Types	cp711_ctmcntype_001.zip
Projects	Contract Management	CTMDFAR	Manage DFAR Library	cp711_ctmdfar_001.zip

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMFAR	Manage FAR Library	cp711_ctmfar_001.zip
Projects	Contract Management	CTMGSA	Manage GSA Schedule Codes	cp711_ctmgsa_001.zip
Projects	Contract Management	CTMVENDRT	Manage Supplier Vendor Rating Codes	cp711_ctmvendrt_001.zip
Projects	Contract Management	CTMVENDDC	Manage Supplier Vendor Rating Descriptions	cp711_ctmvenddc_001.zip
Projects	Contract Management	CTMCNLAB	Manage Contract User-Defined Labels	cp711_ctmcnlab_001.zip
Projects	Contract Management	CTMSBLAB	Manage Subcontract User-Defined Labels	cp711_ctmsblab_001.zip
Projects	Contract Management	CTMOCIRV	Manage OCI Reviewer	cp711_ctmocirv_001.zip
Projects	Contract Management	CTMOCIST	Manage OCI Status	cp711_ctmocist_001.zip
Projects	Contract Management	CTMOCLAB	Manage OCI User-Defined Labels	cp711_ctmoclab_001.zip
Projects	Contract Management	CTMOPSET	Configure Opportunity Settings	cp711_ctmopset_001.zip
Projects	Contract Management	CTMOPPBU	Manage Opportunity Business Units	cp711_ctmoppbu_001.zip
Projects	Contract Management	CTMCLSRS	Manage Opportunity Closed Reasons	cp711_ctmclsrs_001.zip
Projects	Contract Management	CTMRESP	Manage Opportunity Company Responsibilities	cp711_ctmresp_001.zip
Projects	Contract Management	CTMCTTYP	Manage Opportunity Contract Types	cp711_ctmcttyp_001.zip
Projects	Contract Management	CTMLOSS	Manage Opportunity Loss Reasons	cp711_ctmloss_001.zip
Projects	Contract Management	CTMSOURC	Manage Opportunity Sources	cp711_ctmsourc_001.zip
Projects	Contract Management	CTMSTAGE	Manage Opportunity Stages	cp711_ctmstage_001.zip

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMOTYPE	Manage Opportunity Types	cp711_ctmotype_001.zip
Projects	Contract Management	CTMPROB	Manage Opportunity Win/Bid Probabilities	cp711_ctmprob_001.zip
Projects	Contract Management	CTMOPLAB	Manage Opportunity User-Defined Labels	cp711_ctmoplab_001.zip
Projects	Project Setup	PJMSETNG	Configure Project Settings	cp711_pjmsetng_009.zip
Projects	Project Setup	PJMMOD	Manage Modifications	cp711_pjmmod_003.zip
Projects	Project Setup	PJMBASIC	Manage Project User Flow	cp711_pjmbasic_023.zip
Projects	Project Setup	PJPPREP	Import Project Master Data	cp711_pjpprep_020.zip
Projects	Project Setup	PJPMADD	Mass Add Project Master Data	cp711_pjpmadd_007.zip
Projects	Project Inquiry and Reporting	PJRPROJ	Print Project Status Report	cp711_pjrproj_015.zip
Accounting	Accounts Receivable	ARMCUST	Manage Customers	cp711_armcust_003.zip
Accounting	Accounts Payable	APMSCSET	Manage Security Clearance Settings	cp711_apmscset_003.zip
Accounting	Accounts Payable	APMCLRCD	Manage SCI/SAP Clearance Codes	cp711_apmclrcd_003.zip
Accounting	Accounts Payable	APMVEND	Manage Vendors	cp711_apmvend_006.zip
Accounting	Accounts Payable	AOPUTLVU	Import Vendors	cp711_aoputlvu_014.zip
Accounting	Accounts Payable	APMVEMPL	Manage Vendor Employees	cp711_apmvempl_003.zip
Accounting	Accounts Payable	APPUTLVE	Import Vendor Employees	cp711_apputlve_009.zip
People	Employee	EMMUSITAR	Manage Employee Security	cp711_emmusitar_002.zip
Administration	System Administration	SYPSTNG	Rebuild Global Settings	cp711_sypstng_002.zip

Domain	Module	Application ID	Application Name	Application File
Administration	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_017.zip

Projects Domain

This section includes summaries of changes made in relation with the Contract Management feature within the Costpoint Projects domain.

The new Contract Management module has the following application groups:

- Opportunities
- Contracts
- Organizational Conflict of Interest (OCI)
- Customer/Vendor/Employee Information
- Contract Management Controls
- Contracts/Subcontract Controls
- OCI Controls
- Opportunities Controls

This module and its applications are available only if you are licensed for Contract Management.

Several screens in the Project Setup module have also been updated, and a new library file has been created to accommodate changes for this feature.

Opportunities

This application group has the Manage Opportunities screen.

Manage Opportunities (CTMOPP)

Use this new screen to create and maintain information about opportunities that your company wants to pursue. You can use this screen when you need to initialize a new opportunity or when you need to update information related to an existing opportunity. You can manually add opportunities to Costpoint using this screen, or you can import opportunity data from GovWin IQ.

The ability to import opportunities from GovWin IQ will be available in the GA release.

On this screen, you can:

- Set up opportunity names, descriptions, status, address and contact information, milestone dates, and post-award debrief information.
- Track activities (for example, meetings and phone conversations) related to the opportunity.
- Manage customers and vendors/partners associated with the opportunity.
- Identify the employees, prime contractors, and/or subcontractors who are working or will possibly work on the opportunity.
- View organizational conflict of interest and contract records linked to the opportunity.
- Create projects that you want to associate with the opportunity.

- View and print a PSR for the projects linked to the opportunity.

Contracts

This application group has the Manage Contracts, Manage Subcontracts, and View Subcontract Inquiry screens.

Manage Contracts (CTMCNTR)

Use this new screen to set up and manage information about your contracts. Once you won the opportunity, you can use this screen to initiate a contract and link it to the opportunity. You can associate a contract to a Costpoint opportunity (that is, opportunities created using Manage Opportunities or those imported from GovWin IQ), and you can also create a contract for an opportunity that does not exist in your Costpoint database.

On this screen, you can:

- Specify the contract name and description, contract classification, customers and contacts associated with the contract, contract modifications, and contract period of performance dates.
- Specify the employees, contractors, and subcontractors who will be working on the contract.
- Rate supplier/vendor performance.
- Add task orders, activities, and documents related to the contract.
- Indicate procurement regulations that apply to the contract, as well as provisions and limitations specified in the contract.
- Create or update projects that you want to associate with the contract.
- Create and/or update contract modifications, if these functionalities are enabled on the Configure Project Settings screen.
- View projects and subcontracts linked to the contract.
- View and print PSRs for the projects linked to the contract.
- Assign applicable Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation (DFAR) clauses to the contract.
- Manage contract closeout dates and information.

Manage Subcontracts (CTMSBCNTR)

Use this new screen to set up and maintain subcontract information. You can track the percent of subcontract value to total contract value as well as the amount of funding remaining. In addition, this screen allows you to:

- Evaluate subcontractor performance.
- Create and/or update subcontract modifications, if these functionalities are enabled on the Configure Project Settings screen.
- Link and view requisitions and purchase orders associated with subcontracts.
- Link subcontracts to opportunities, contracts, and projects.
- View and print the PSR for the project linked to the subcontract.
- Specify subcontract classification and track subcontract requirements.

- Manage FAR and DFAR clauses that flow down from the contract to the subcontract.

View Subcontract Inquiry (CTQSUBC)

With this new screen, you can review subcontract information without printing a report and view data for subcontracts that were created using the Manage Subcontracts screen. You can limit your search criteria by fields such as **Subcontract ID**, **Subcontractor/Vendor ID**, **Contract ID**, **Opportunity ID**, **Contract Task Order No**, or **Prime Contract No**.

Organizational Conflict of Interest (OCI)

This application group has the Manage Organizational Conflict of Interest (OCI) screen.

Manage Organizational Conflict of Interest (OCI) (CTMOCI)

Use this new screen to set up and maintain organizational conflicts of interest. An OCI may arise if a company has engaged in activities that would give it an unfair competitive advantage in bidding on an opportunity.

On this screen, you can:

- Identify and link OCIs to opportunities that may be in conflict with an existing project or other opportunities.
- Track and search on OCI reviews, clearance dates, and key terms.
- Track activities (for example, meetings and phone conversations) around the OCI.
- Pull and link subcontractors/vendors and employees who have worked on conflicting projects.

Customer/Vendor/Employee Information

Use this application group to set up, maintain information for, and approve prospective vendors and prospective customers. You can also view information about employees and opportunities and contracts linked to these employees.

Manage Contract Management Customer Info (CTMCUST)

Use this new screen to enter and maintain information for prospective customers that may be associated with your opportunities. Prospective customers must be approved using the Approve Prospective Customers screen before they can be used in contracts, projects, and invoices. After approval, prospective customers become regular customers.

Approve Prospective Customers (CTMCUSTA)

With this new screen, you can approve prospective customers before they can be selected as a customer on a project or be used in invoices. You can also disapprove one or multiple prospective customers.

Manage Contract Management Vendor Info (CTMVEND)

Use this new screen to set up prospective vendors that can be linked to opportunities. Prospective vendors must be approved using the Approve Prospective Vendors screen before they can be used in contracts and projects. After approval, prospective vendors become regular vendors.

Approve Prospective Vendors (CTMVENDA)

With this new screen, you can approve prospective vendors before they can be used in vouchers and cash disbursements. You can also disapprove one or multiple prospective vendors.

Manage Contract Management Employee Info (CTMEMPL)

This new application allows you to view information about your employees so you can determine the employees that have the training, skills, and security details necessary to work on potential contracts and opportunities. All fields on this screen and its subtasks are read-only.

Contract Management Controls

Use this application group to set up and maintain overall settings used in the Contract Management module.

Configure Contract Management Settings (CTMSETNG)

This new screen enables you to configure settings used in the Contract Management module. You can control and track contracts and subcontracts and configure corporate settings that apply to all companies in your database. You can also use this screen to specify parameters in viewing project status reports for contracts and subcontracts.

Manage Activity Methods (CTMACTM)

Use this new screen to create and manage methods that define the activities one can perform within the Contract Management module. You can use these activity methods when you define opportunities, contracts, subcontracts, and organizational conflicts of interest.

Manage Activity Subject (CTMACTS)

Use this new screen to set up and manage activity subjects that you can use when you create opportunities, contracts, subcontracts, and organizational conflicts of interest.

Manage Agencies (CTMAGENC)

This new screen allows you to enter and maintain government agency codes that you can assign to an opportunity or contract.

Manage Contract Management Roles (CTMROLES)

Use this new screen to enter and maintain roles used in the Contract Management module. You can mark these roles as applicable to employees, customers, contacts, and/or members of a team.

Manage Contract Vehicles (CTMCNTVEH)

Use this new screen to enter and maintain contract vehicle codes.

Manage Document Types (CTMDOCTP)

This new screen allows you to enter and maintain document type codes that can be used for opportunities, contracts, subcontracts, and OCI records.

Manage NAICS Codes (CTMNAICS)

Use this new screen to enter and maintain North American Industry Classification System (NAICS) codes that can be assigned to an opportunity, contract, or subcontract. NAICS codes are government-designed codes used to identify the industry in which a company operates.

Contracts/Subcontracts Controls

Use this application group to establish settings used in managing contracts and subcontracts created within the Contract Management module.

Manage Agreement Types (CTMAGRTYPE)

Use this new screen to enter and maintain agreement types that you can use for your subcontracts.

Manage Contract Date Types (CTMCNTDT)

Use this new screen to enter and maintain contract date types that will be used on the Dates tab of the Manage Contracts screen.

Manage Contract Status (CTMCNTST)

This new screen allows you to enter and maintain the statuses of your contracts and subcontracts.

Manage Contract Types (CTMCNTYPE)

Use this new screen to enter and maintain the various contract types that you can use in the Contract Management module.

Manage DFAR Library (CTMDFAR)

Use this new screen to enter and maintain Defense Federal Acquisition Regulation (DFAR) clauses that you can use on contracts and subcontracts.

Manage FAR Library (CTMFAR)

Use this new screen to enter and maintain Federal Acquisition Regulation (FAR) clauses and provisions that you can use on contracts and subcontracts.

Manage GSA Schedule Codes (CTMGSA)

Use this new screen to enter and maintain General Services Administration (GSA) schedule codes that you can assign to a contract or subcontract.

Manage Supplier Vendor Rating Codes (CTMVENDRT)

With this new screen, you can enter and maintain supplier/vendor rating codes and their corresponding values. Rating codes are used to rank suppliers or vendors and assign them a total score for performance evaluation purposes. You can link these rating codes to suppliers/vendors defined on the Supplier/Vendor Rating tab of the Manage Contracts and Manage Subcontracts screens.

Manage Supplier Vendor Rating Descriptions (CTMVENDDC)

This new screen enables you to view and maintain supplier/vendor rating descriptions that you can use to evaluate suppliers or vendors. This screen automatically displays Costpoint-defined description codes that are classified into four areas:

- Customer Service, Quality and Delivery
- Financial
- Relationship
- Responsiveness/Innovation

The descriptions entered on this screen can be modified and will display on the Supplier/Vendor Rating subtask of the Supplier/Vendor Rating tab on the Manage Contracts and Manage Subcontracts screens.

Manage Contract User-Defined Labels (CTMCNLAB)

Use this new screen to customize labels for the user-defined fields for contracts. These labels are optional, but if there is additional information that you want to capture about a contract, you can set up labels on this screen.

Manage Subcontract User-Defined Labels (CTMSBLAB)

Use this new screen to customize labels for the user-defined fields for subcontracts. These labels are optional, but if there is additional information that you want to capture about a subcontract, you can set up labels on this screen.

OCI Controls

Use this application group to set up reviewers, statuses, and user-defined labels for OCIs established within the Contract Management module.

Manage OCI Reviewer (CTMOCIRV)

Use this new screen to set up and maintain OCI reviewers. The OCI reviewers will be the only users able to set the **Clear Date Review** fields on the Manage Organizational Conflict of Interest (OCI) screen.

Manage OCI Status (CTMOCIST)

Use this new screen to set up and maintain OCI statuses.

Manage OCI User-Defined Labels (CTMOCLAB)

Use this new screen to customize labels for the user-defined fields for OCIs. These labels are optional, but if there is additional information that you want to capture about an OCI, you can set up labels on this screen.

Opportunities Controls

Use this application group to establish and maintain settings used for opportunities defined in the Contract Management module.

Configure Opportunity Settings (CTMOPSET)

Use this new screen to set up and control settings used in tracking opportunities. You can also customize opportunity label names and specify parameters in viewing PSRs for opportunities.

Manage Opportunity Business Units (CTMOPPBU)

Use this new screen to enter and maintain business units that may be assigned to an opportunity, and optionally link these business units to Costpoint organizations.

Manage Opportunity Closed Reasons (CTMCLSRS)

Use this new screen to enter and maintain reasons why an opportunity would be marked as closed.

Manage Opportunity Company Responsibilities (CTMRESP)

This new application allows you to enter and maintain roles or responsibilities that your company may have on an opportunity.

Manage Opportunity Contract Types (CTMCTTYP)

Use this new screen to enter and maintain contract types that opportunities represent.

Manage Opportunity Loss Reasons (CTMLOSS)

Use this new screen to enter and maintain opportunity loss reasons.

Manage Opportunity Sources (CTMSOURC)

With this screen, you can enter and maintain source codes that define where an opportunity is obtained.

Manage Opportunity Stages (CTMSTAGE)

Use this new screen to set up and maintain the different stages of an opportunity that your company uses.

Manage Opportunity Types (CTMOTYPE)

On this new screen, you can enter and maintain opportunity types that you can use to classify opportunities identified on the Manage Opportunities screen.

Manage Opportunity Win/Bid Probabilities (CTMPROB)

Use this new screen to enter and maintain codes that represent the percentage of bidding on or winning an opportunity.

Manage Opportunity User-Defined Labels (CTMOPLAB)

Use this new screen to customize labels for the user-defined fields for opportunities. These labels are optional, but if there is additional information that you want to capture about an opportunity, you can set up labels on this screen.

Project Setup

The following existing applications have been updated to support changes required by the Contract Management feature.

Configure Project Settings (PJMSETNG)

The new **Contract Management Options** group box on this screen determines whether users are allowed to create and/or update project modifications from the Contract Management module. This group box has the following check boxes:

- **Allow Creation of New Project Modifications from Contract Modifications** — Select this check box to enable creation of project modifications within the Contract Management module. When you select this check box, users can add new modifications for projects linked to contracts and/or subcontracts on the Manage Contracts or Manage Subcontracts screen.
- **Allow Override** — This check box is enabled only if you select the **Allow Creation of New Project Modifications from Contract Modifications** check box. Select this check box to allow users to override the selection for the **Create New Project Modifications** check box within the Contract Management module for a specific contract or subcontract record.
- **Allow Update of Existing Project Modifications from Contract Modifications** — Select this check box to enable updating of existing project modifications within the Contract Management module. When you select this check box, users can modify existing modifications for projects linked to contracts and/or subcontracts on the Manage Contracts or Manage Subcontracts screen.

Manage Modifications (PJMMOD)

The following fields are now available on this screen so you can view the contract and subcontract records associated with the project you are accessing. These fields are visible only if you are licensed for Contract Management.

- **Contract** — This field displays the contract ID associated with the project if modifications are created or updated for that project on the Contract/Project Modifications subtask of the Manage Contracts screen.
- **Subcontract** — This field displays the subcontract ID associated with the project if modifications are created or updated for that project on the Subcontract/Project Modifications subtask of the Manage Subcontracts screen.
- **Contract Modification ID** — This field displays the contract modification ID corresponding to the modification created or updated for the project on the Contract/Project Modifications subtask of the Manage Contracts screen.
- **Subcontract Modification ID** — This field displays the subcontract modification ID corresponding to the modification created or updated for the project on the Subcontract/Project Modifications subtask of the Manage Subcontracts screen.

Manage Project User Flow (PJMBASIC)

These fields have been added to the Details tab of this screen:

- **Task Order No** — Enter the task order number for the project. If the **Allow Edit** check box at the project level above the current one is selected, you can enter any task order number. However, if the **Allow Edit** check box is empty, the default top-level task order number cannot be modified.

- **CTM Contract ID** — Enter or select the Contract Management (CTM) contract ID for the project. If the **Allow Edit** check box at the project level above the current one is selected, you can enter any contract ID. However, if the **Allow Edit** check box is empty, the default top-level contract ID cannot be modified.
- **CTM Opportunity ID** — Enter or select the CTM opportunity ID for the project. If the **Allow Edit** check box at the project level above the current one is selected, you can enter any opportunity ID. However, if the **Allow Edit** check box is empty, the default top-level opportunity ID cannot be modified.

On the Modifications subtask, the following fields are now available if you are licensed for Contract Management:

- **Contract Modification ID** — This field displays the contract modification ID corresponding to the modification created or updated for the project on the Contract/Project Modifications subtask of the Manage Contracts screen.
- **Subcontract Modification ID** — This field displays the subcontract modification ID corresponding to the modification created or updated for the project on the Subcontract/Project Modifications subtask of the Manage Subcontracts screen.

Import Project Master Data (PJPPREP)

This application has been updated to incorporate the new fields added to the Manage Project User Flow screen. The input file layout for the PROJ.csv template includes six new columns:

- TASK_ORDER_NO
- CNTR_ID
- OPP_ID
- TASK_ORDER_FL
- CNTR_ID_FL
- OPP_ID_FL

Mass Add Project Master Data (PJPMADD)

Mass Add Project Master Data has been modified to include the new functionality that supports project initialization from the Contract Management module. This functionality facilitates the creation of projects to include information already maintained in Contract Management.

This screen is now available as a subtask (Project Initialization) on the Manage Opportunities and Manage Contracts screens, and has the following new fields in the Details table window:

- **Task Order** — Enter the task order number to be associated with the destination project.
- **Work Force** — This check box determines whether the **Project Work Force Required** option is selected for the destination project. The selection for the template project defaults here. You cannot modify this check box.
- **Revenue Level** — This check box determines whether a revenue formula is assigned to the destination project. This defaults from the template project and cannot be modified.
- **Revenue Formula** — This field displays the revenue formula assigned to the destination project. The template project revenue formula defaults in this field and cannot be modified.
- **Billing Level** — This check box determines whether a billing formula is assigned to the destination project. This defaults from the template project and cannot be modified.

- **Billing Formula** — This field displays the billing formula assigned to the destination project. The template project billing formula defaults in this field and cannot be modified.
- **Direct Cost Ceiling** — This check box determines whether a direct cost ceiling amount is imposed for the destination project. This defaults from the template project and cannot be modified.
- **Burden Ceiling** — This check box determines whether a burden ceiling amount is imposed for the destination project. This defaults from the template project and cannot be modified.
- **Hours Ceiling** — This check box determines whether an hours ceiling amount is imposed for the destination project. This defaults from the template project and cannot be modified.

Libraries

New libraries have been created to support the changes required by the Contract Management feature.

Contract Management Library (CTLIB)

This library contains common business logic that is shared by the applications in the Contract Management module.

Mass Add Projects Library (PJMASSADD)

This library contains common business logic that is shared by the Mass Add Project Master Data application and the Project Initialization subtask of the Manage Opportunities and Manage Contracts applications.

Accounting Domain

This section includes summaries of changes made in relation with the Contract Management feature within the Costpoint Accounting domain.

Accounts Receivable

Manage Customers (ARMCUST)

A new validation has been added to this application. Costpoint checks the **Customer IDs** in ARMCUST to determine if they have been used in Contract Management.

Accounts Payable

Manage Security Clearance Settings (APMSCSET)

You can now access the Manage Security Clearance Settings screen in the Employee module through the menu path **People » Employee » Employee Controls » Manage Security Clearance Settings**.

Manage SCI/SAP Clearance Codes (APMCLRCD)

You can now access the Manage SCI/SAP Clearance Codes screen in the Employee module through the menu path **People » Employee » Employee Controls » Manage SCI/SAP Clearance Codes**.

Manage Vendors (APMVEND)

A new **CAGE Code** field is now available on this screen, where you can track the CAGE code of your vendors.

A new validation has also been added to this application. Costpoint checks the **Vendor ID** in APMVEND to determine if there are duplicates in the Contract Management tables.

Import Vendors (AOPUTLVU)

Import Vendors has been updated to include a new field, **CAGE Code**, when transferring vendor data from an input file or database table.

A new validation has also been added to this application. Costpoint checks the **Vendor ID** in AOPUTLVU to determine if there are duplicates in the Contract Management tables.

Manage Vendor Employees (APMVEMPL)

A new validation has been added to this application. Costpoint checks the **Vendor Employee IDs** in APMVEMPL to determine if there are duplicates in the Contract Management tables.

Import Vendor Employees (APPUTLVE)

A new validation has been added to this application. Costpoint checks the **Vendor Employee IDs** in APPUTLVE to determine if there are duplicates in the Contract Management tables.

People Domain

This section includes summaries of changes made in relation with the Contract Management feature within the Costpoint People domain.

Employee

Manage Employee Security (EMMUSITAR)

The following are the updates to the Manage Employee Security screen:

- The screen name changed from “Manage Employee U.S. and ITAR Data” to “Manage Employee Security.”
- A new subtask, Security Clearances, allows you to assign one or more security clearances to the employee. This subtask has the Link SCI/SAP Security Codes subtask that allows you to link one or more Sensitive Compartmented Information (SCI)/Special Access Program (SAP) clearance codes to each of the employee’s security clearances flagged as SCI or SAP.

Administration Domain

This section includes summaries of changes made in relation with the Contract Management feature within the Costpoint Administration domain.

System Administration

Rebuild Global Settings (SYPSTNG)

The new **Opportunities/Contracts** check box in Rebuild Global Settings enables you to reload the latest values from the Configure Opportunity Settings screen and the Configure Contract Management Settings screen to the Costpoint server.

Set Up Company (SYPCOMP)

Set Up Company has been modified to include the new fields on the Configure Project Settings screen when copying settings from one company to another. These new fields are:

- **Allow Creation of New Project Modifications from Contract Modifications** check box (PROJ_CNTL.CNTR_MOD_CRT_FL)
- **Allow Override** check box (MOD_CRT_OVRD_FL)
- **Allow Update of Existing Project Modifications from Contract Modifications** check box (CNTR_MOD_UPD_FL)

View Help About (SYMABOUT)

The Features subtask now includes the Contract Management feature.

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

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**.

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