

Deltek Costpoint® 7.1.1

Cumulative Release Notes for May 2018

May 31, 2018

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Overview

This document is a compilation of the release notes distributed for the enhancements made in Costpoint, Budgeting and Planning, and Time & Expense in May 2018. This document includes descriptions of the enhancements in relation with system jars, application jars, libraries, and regulatory updates since the last system jar release.

Note: Release notes contain summaries of the enhancements made. Refer to the online help for additional details.

[Costpoint 7.1.1 Online Help](#)

Platform Changes

Display the Company, System, and Environment Names on the Global Menu

To easily identify multiple companies, systems, and environments in Costpoint, you can associate colors with each company and define environment and system names. The Configure System Settings (SYMSETNG) screen is updated to enable a company to define and display the environment name, and display the system name, on the Global Menu. The updates include:

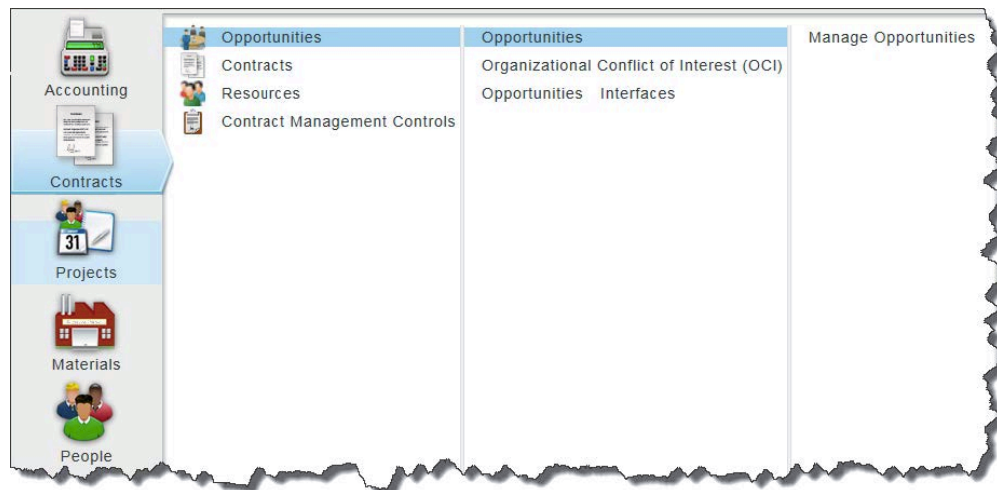
- A new **Environment Name** field where you can specify an environment name that displays on the Global Menu.
- A new **Display System in the Header** check box to select to display the system name on the Global Menu.
- The **Header Color** field, previously called UI Background Color, where you can select a color that displays on the Global Menu. The current color associations that were defined using the UI Background Color setting are retained.

This enhancement requires the following:

- PATCH3356
- cp711_sypcomp_018.zip

Updated Browse Application Menu

The Browse Application menu in Costpoint is updated with new domain icons and the new Contracts domain.



This enhancement requires cp711_sys_041.zip.

WebLogic 12.1.3 and WebLogic 12.2.1.3 April 2018 CPU Support for Costpoint 7.1.1

The Costpoint 7.1.1 Framework installer is updated to include support and compatibility for WebLogic 12.1.3 and WebLogic 12.2.1.3 Oracle Critical Patch Update (April 2018). The update aims to address multiple security vulnerabilities.

This enhancement requires the following:

Platform Changes

- jdk1.8.0_172.exe
- p27419391_121300_Generic.zip

Costpoint 7.1.1 Framework Installer Update

The Costpoint 7.1.1 Framework installer is updated to log an error in the ISS file when the installer detects an invalid path to the Costpoint Application install directory.

Installation Instructions

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 Support Center at <https://deltek.custhelp.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 Support Center 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 Support Center 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).

Note: Most of the features installed have their corresponding patches, but not all.

More Information:

If you have any questions, please contact Deltek Support Center at <https://deltek.custhelp.com>

Costpoint

Accounting

Ability to Create a Net Entry for Balance Sheet Revaluation

The Create Revaluation Entry process can be run more than once within the same period. In the current functionality, if the original adjusting journal entry (AJE) or balance sheet revaluation (BSR) entry has not yet been posted and the previous period's reversal entry has already been posted, Costpoint deletes the current period's unposted entry and replaces it with the new one. If the original AJE/BSR entry has been posted, Costpoint creates a new one, which doubles the amounts previously posted. If the reversal entry from the previous period has not been posted, Costpoint deletes that and creates the new entry.

With this enhancement, the process of creating the entry has been changed so that if an entry has already been posted in the current period, the new entry created by Costpoint will be a net entry that takes into account the amounts already posted in the current period, but excludes reversal entries previously posted in the current period.

Several applications have been updated to support this change.

Configure General Ledger Settings (GLMSETNG)

A new check box, **Create Revaluation as Net**, has been added to this screen. Select this check box to create revaluation entries at net amounts. If you do not select this check box, revaluation entries will be created at year-to-date amounts.

Create Revaluation Entry (GLPBSREV)

This application has been updated to create revaluation entries as net entries if the **Create Revaluation as Net** check box is selected on the Configure General Ledger Settings screen.

Set Up Company (SYPCOMP)

Set Up Company has been updated to include the value of the **Create Revaluation as Net** check box when setting up a new company or copying settings from one company to another.

Application JAR Requirement

This enhancement requires cp711_glpbsrev_010.zip.

Contracts

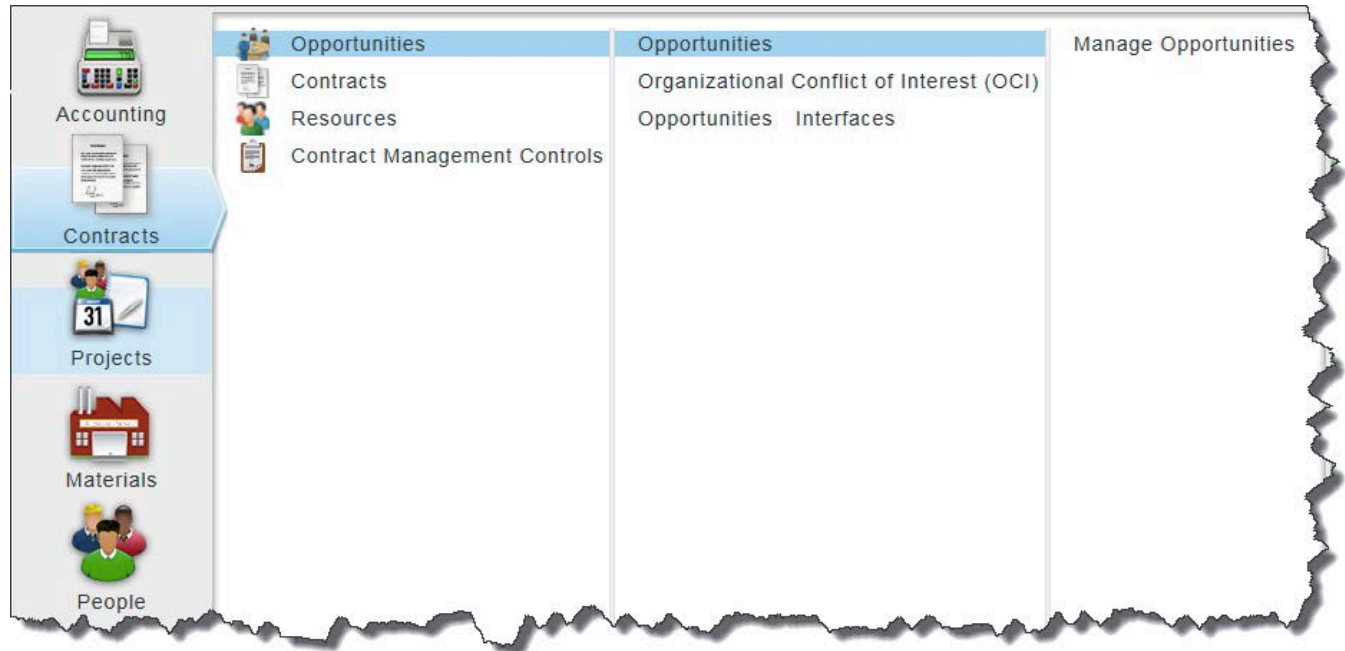
New Contracts Domain: Menu Change

The Contract Management module previously under the Projects domain is now a separate Contracts domain within Costpoint. This enhancement gives the Contract Management solution more visibility and also allows you to quickly navigate to the Contract Management solution.

New modules and application groups have been created to support this update. Eleven applications have been moved to the new Opportunities, Contracts, and Resources modules, while the rest of the screens remain in the Contract Management Controls module.

The following image displays the Contracts domain on the Navigation screen. The table that follows lists the modules, application groups, and applications available in this domain, listed in order as they display on the UI.

Costpoint



Module	Application Group	Application
Opportunities	Opportunities	Manage Opportunities
	Organization Conflict of Interest (OCI)	Manage Organizational Conflict of Interest (OCI)
	Opportunities Interfaces	Import GovWin IQ Data
Contracts	Contracts	Manage Contracts
	Subcontracts	Manage Subcontracts
	Subcontracts Reports and Inquiries	View Subcontract Inquiry
Resources	Customer/Vendor/Employee Information	Manage Contract Management Customer Info
		Approve Prospective Customers
		Manage Contract Management Vendor Info
		Approve Prospective Vendors
		Manage Contract Management Employee Info
Contract Management Controls	Contract Management Controls	Configure Contract Management Settings
		Manage Activity Methods
		Manage Activity Subject

Module	Application Group	Application
		Manage Agencies
		Manage Contract Management Roles
		Manage Contract Vehicles
		Manage Document Types
		Manage NAICS Codes
	Contract/Subcontracts Controls	Manage Agreement Types
		Manage Contract Date Types
		Manage Contract Status
		Manage Contract Types
		Manage DFARS Library
		Manage FAR Library
		Manage GSA Schedule Codes
		Manage Supplier Vendor Rating Codes
		Manage Supplier Vendor Rating Descriptions
		Manage Contract User-Defined Labels
		Manage Subcontract User-Defined Labels
	OCI Controls	Manage OCI Reviewer
		Manage OCI Status
		Manage OCI User-Defined Labels
	Opportunities Controls	Configure Opportunity Settings
		Manage Opportunity Business Units
		Manage Opportunity Closed Reasons
		Manage Opportunity Company Responsibilities
		Manage Opportunity Contract Types
		Manage Opportunity Loss Reasons
		Manage Opportunity Sources

Module	Application Group	Application
		Manage Opportunity Stages
		Manage Opportunity Types
		Manage Opportunity Win/Bid Probabilities
		Manage Opportunity User-Defined Labels

Patch and System JAR Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 041 (cp711_sys_041.zip)
- PATCH5116
- PATCH7148

Ability to Include DPAS Purchasing Rating on Contracts

Costpoint now allows you to include the Defense Priorities and Allocations System (DPAS) purchasing rating code assigned to a contract. The purpose of the DPAS is to assure the timely availability of industrial resources to meet current national defense and emergency preparedness program requirements and to provide an operating system to support rapid industrial response in a national emergency. Contract and subcontract administrators can use this information in determining their priority when issuing purchase orders.

Several applications in Costpoint have been updated so you can enter the DPAS number assigned to a contract and track it through to the project so that Costpoint Purchasing can pick it up and include it in the purchase order.

Manage Contracts (CTMCNTR)

The **DPAS Purchasing Rating** field is now available on the Contract Info tab of this screen. Use this field to enter the DPAS purchasing rating code assigned to the contract.

The Project Initialization subtask on this screen has also been updated to include the new field when initializing or updating projects.

When you run Project Initialization, Costpoint updates the **DPAS Purchasing Rating** field on the following screens with the **DPAS Purchasing Rating** value from Manage Contracts for the new or updated projects:

- Manage Government Contract Information screen
- Government Contract subtask of the Manage Project User Flow screen

If the code is not provided in Manage Contracts, users can still enter the DPAS purchasing rating code in Manage Government Contract Information or Manage Project User Flow, if applicable.

Manage Subcontracts (CTMSBCNTR)

A new field, **DPAS Purchasing Rating**, has been added to the Subcontract Info tab of this screen to display the DPAS purchasing rating code assigned to the subcontract project ID associated with the subcontract record. The value in this field is read-only and comes from the **DPAS Purchasing Rating** field in Manage Government Contract Information or Manage Project User Flow.

Patch and Other Requirements

This enhancement requires the following:

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- PATCH3453
- Common library - PJMASSADD (cp711_cmnlb_PJMASSADD_005.zip)

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 ID	Application Name	Application File
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_006.zip
Contracts	Contracts	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_006.zip

Patch 3466

PATCH3466 has been released in preparation for the future enhancements for the Manage Opportunities, Configure Opportunity Settings, Manage Opportunity Stages, and Manage DFARS Library screens.

Patch 3467

PATCH3467 has been released in preparation for the future enhancements for the Configure Opportunity Settings screen and for an upcoming new screen in the Contracts domain.

Patch 3468

PATCH3468 has been released in preparation for the future enhancements for the Manage Subcontracts screen.

New Contracts Domain: Application Changes

The Contract Management module previously under the Projects domain is now a separate Contracts domain within Costpoint. This enhancement gives the Contract Management solution more visibility and also allows you to quickly navigate to the Contract Management solution.

Applications in the New Modules

With this enhancement, new modules and application groups have been created under the Contracts domain. The following applications, previously under the Contract Management Controls (CT) module, are now displayed in the new Opportunities (OP), Contracts (CN), and Resources (RE) modules:

- Opportunities module
 - Manage Opportunities (CTMOPP)
 - Manage Organizational Conflict of Interest (OCI) (CTMOCI)
 - Import GovWin IQ Data (CTPIQDAT)
- Contracts module
 - Manage Contracts (CTMCNTR)
 - Manage Subcontracts (CTMSBCNTR)
 - View Subcontract Inquiry (CTQSUBC)
- Resources module
 - Manage Contract Management Customer Info (CTMCUST)

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- Approve Prospective Customers (CTMCUSTA)
- Manage Contract Management Vendor Info (CTMVEND)
- Approve Prospective Vendors (CTMVENDA)
- Manage Contract Management Employee Info (CTMEMPL)

The rest of the screens in the Contracts domain remain in the Contract Management Controls module.

Note: It is important to note that while Import GovWin IQ Data now displays in the Opportunities module, access to this application is still under the Contract Management Controls module in this release. Access to this screen will be set under Opportunities in a succeeding release.

Use the Manage Users and Manage User Groups screens in the Admin domain to review or modify user and user group access rights to the modules.

Print Menu Report (SYRMENU)

A new check box, **Contracts**, has been added to the **Options** group box of this screen to allow you to include the Contracts domain and its modules when you print Costpoint menu information.

Patch Requirements

This enhancement requires PATCH3424.

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 ID	Application Name	Application File
Contracts	Opportunities	CTMOCI	Manage Organizational Conflict of Interest (OCI)	cp711_ctmoci_005.zip
Contracts	Opportunities	CTMOPP	Manage Opportunities	cp711_ctmopp_006.zip
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_006.zip
Contracts	Contracts	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_006.zip
Contracts	Contracts	CTQSUBC	View Subcontract Inquiry	cp711_ctqsubc_002.zip
Contracts	Resources	CTMCUST	Manage Contract Management Customer Info	cp711_ctmcust_005.zip
Contracts	Resources	CTMCUSTA	Approve Prospective Customers	cp711_ctmcusta_004.zip

Domain	Module	Application ID	Application Name	Application File
Contracts	Resources	CTMEMPL	Manage Contract Management Employee Info	cp711_ctmempl_004.zip
Contracts	Resources	CTMVEND	Manage Contract Management Vendor Info	cp711_ctmvend_005.zip
Contracts	Resources	CTMVENDA	Approve Prospective Vendors	cp711_ctmvenda_004.zip
Admin	System Administration	SYRMENU	Print Menu Report	cp711_syrmenu_002.zip

Projects

Transfer of the Contract Management Module as a New Domain

The Contract Management Module has been removed under the Projects domain and is now a new Costpoint domain.

People

Updated Header and Instructions on Life Events and Benefits Enrollment

The Life Events/New Hires screen and the Benefits Enrollment screen now provide more information on the screen header and in the Instructions tab. To support this enhancement, this Costpoint release applies the corresponding changes to the following applications:

Life Events/New Hires (ESMLIFEEVENT)

- The Life Event, Life Event Date, and Status fields now display in the header across the top of the screen.
- The header displays the following additional information:
 - Employee Last Name
 - Employee First Name
 - Employee ID
- This Instructions tab now discuss the following:
 - Selection of benefits
 - Negative amounts for premiums
 - Saving dependent/beneficiary changes

Benefits Enrollment (ESMBENENROLL)

- The header information now displays across the top part of the screen.
- The field label changed from “Open Enrollment Period” to “Open Enrollment Period Start and End Dates” fields. This field is now included in the header.
- The field label changed from “Effective Dates” to “Benefits Start and End Dates.” This field is now included in the header.

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- The Instructions tab now discuss the following:
 - Selection of benefits
 - Rollover of benefits
 - Negative amounts for premiums
 - Saving dependent/beneficiary changes

Application JAR Requirements

Domain	Module	Application ID	Application Name	Application File
People	Employee Self Service	ESMBENENROLL	Benefits Enrollment	cp711_esmbenenroll_014.zip
People	Employee Self Service	ESMLIFEEVENT	Life Events/New Hires	cp711_esmlifeevent_018.zip

Regulatory and Compliance

IMPORTANT NOTES

Versions 7.0.1 and 7.1.1 - Calendar Year End 2018

In an effort to allow adequate time to prepare for future year-end system jar requirements, please be aware that you must have the following System JARs loaded before the Calendar Year End 2018 release which is scheduled for December 2018. Appropriate action should be taken throughout the next months to plan for this System JAR requirement.

Anticipated Calendar Year End 2018 System JAR Requirements

- Costpoint 7.0.1: System JAR 054 (to be released June 2018)
- Costpoint 7.1.1: System JAR 028 (released April 2017)

Version 7.1.1 – Further Reductions in the Need to Release Regulatory Updates within System JARs

We are happy to announce that we have made several programming changes within the past year to limit the need for regulatory changes to be released via System JAR. System JAR 028 for Costpoint 7.1.1 was part of that effort. The coding changes introduced in System JAR 028 for Costpoint 7.1.1 allowed us to disassociate payroll computation coding changes from future 7.1.1 System JAR releases. So, after System JAR 028, changes to Costpoint version 7.1.1's Compute Payroll application will not require deployment via System JAR as they did in the past. This means that we can deploy Costpoint 7.1.1 regulatory updates and fixes more quickly, and help us keep the System JAR requirements for Calendar Year End releases as minimal as possible.

2018 May Tax Table Update

This Costpoint release includes regulatory changes for May 2018.

Idaho

Idaho's withholding tax tables were updated to reflect new tax laws. To be able to use the 2018 withholding tables in payroll, this release adds new records effective January 1, 2018 for Idaho on the Manage State Taxes screen and Manage State Tax Tables screen.

The following are tax updates to Idaho:

- Withholding tables for Single and Married have been updated.
- One withholding allowance is now **\$2,960**.
- Supplemental withholding rate decreases from 7.4 percent to **6.925 percent**.

Note: For more information, please refer to *A Guide to Idaho Income Tax Withholding*: https://tax.idaho.gov/pubs/EPB00006_04-27-2018.pdf.

Utah

Utah's withholding formula was updated to account for the recent changes in the federal tax law. To be able to use the 2018 withholding formula in payroll, this release adds new records, effective May 1, 2018, for the Utah on the Manage State Tax Withholding Adjustments screen and Manage State Tax Tables screen.

The following are the tax updates for Utah:

- Flat income tax rate decreases from 5 percent to **4.95 percent**.
- Withholding tables for Single and Married were updated.

Note: For more information, please refer to the *Utah Withholding Tax Guide*: <https://tax.utah.gov/forms/pubs/pub-14.pdf>.

HotFix Requirements

These enhancements require the following Costpoint 7.1.1 releases:

- PATCH3459
- PATCH3471

2018 Colorado Tax Table Update

In response to the federal tax code overhaul (Pub. L. 115-97), the Colorado Department of Revenue announced an update to their allowance table on April 2, 2018 (effective April 1, 2018). The amount per allowance will remain \$4,050.00 for each allowance up to 6 allowances, but the amount will differ for 7 or more allowances.

To be able to use the 2018 exemption amount for employees claiming more than six allowances, this Costpoint release adds a new allowance table for Colorado on the Manage State Tax Withholding Adjustments screen.

Allowance Table (for wages paid on or after April 1, 2018)

If the number of withholding allowances is:	Total amount of withholding allowance for the payroll period (Annually)
0	\$0
1	4,050
2	8,100
3	12,150
4	16,200
5	20,250
6	24,300
7	22,950
8	21,600

If the number of withholding allowances is:	Total amount of withholding allowance for the payroll period (Annually)
9	20,250
10	18,900
Over 10	Use the amount for 10 allowances in the appropriate payroll period.

Note: For more information please refer to the table in the Colorado Income Tax Withholding Tables for Employers guide: <https://www.colorado.gov/pacific/sites/default/files/DR1098.pdf>.

Screen Updates

This Costpoint release applies the corresponding updates to the following screens for this enhancement:

Compute Payroll (PRPCPR)

The application was updated to retrieve the correct personal exemption amount from Manage State Tax Withholding Adjustments application for Colorado.

Manage Employee Earnings History (PRMERF)

A new column was added to the work tables used by the application's common code.

Manage Payroll Records (PRMPTF)

The application was updated to retrieve the correct personal exemption amount from Manage State Tax Withholding Adjustments application for Colorado.

Manage State Tax Withholding Adjustments (PRMSTAC)

A Number of Exemptions or Credits field allows you to enter the number of exemptions or credits if the tax allowance option in the Type field is Personal Exemption Allowances.

Print Data Dictionary Report (SYRDD)

The application report now includes information for the Number of Exemptions or Credits (EXMPT_OR_CREDIT_NO) field in the State Tax Allowances and Credits (STATE_TAX_ALL_CR) table.

Print Quarterly Federal Payroll Tax Report (PRRFDTAX)

A new column was added to the work tables used by the application's common code.

Print Soc Sec and Medicare Reconciliation Report (PRRFICA)

A new column was added to the work tables used by the application's common code.

Recompute Taxable Wages (PRPRCOMP)

A new column was added to the work tables used by the application's common code.

HotFix Requirements

These enhancements require the following Costpoint 7.1.1 releases:

- System JAR 028
- PATCH3396
- PATCH3465

Costpoint

- Common Lib - CPCPR (cp711_cmnlb_CPCPR_011.zip)

Note: If any of the following updates apply to your company, you must install the corresponding patch **before** installing the May 2018 Colorado tax table update:

PATCH3374 — New York, Ohio & Wyoming SUTA Wage Base

PATCH3385 — Virgin Island SUTA Wage Base / Oregon & Virgin Island State Tax

PATCH3401 — Louisiana Withholding Tax

PATCH3459 — Utah & Idaho State Tax

PATCH3471 — Utah State Tax

If you attempt to install these patches after installing the May 2018 Colorado tax table update, the state updates will not be properly implemented.

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
People	Payroll	PRPCPR	Compute Payroll	cp711_prpcpr_023.zip
People	Payroll	PRMERF	Manage Employee Earnings History	cp711_prmerf_014.zip
People	Payroll	PRMPTF	Manage Payroll Records	cp711_prmptf_018.zip
People	Payroll	PRMSTAC	Manage State Tax Withholding Adjustments	cp711_prmstac_007.zip
People	Payroll	PRRFICA	Print Soc Sec and Medicare Reconciliation Report	cp711_prrfica_010.zip
People	Payroll	PRPRCOMP	Recompute Taxable Wages	cp711_prprcomp_007.zip

Note: System JAR 054 for Costpoint 7.0.1 introduced an update to the Colorado state tax withholding tables. In response to the federal tax code overhaul (Pub. L. 115-97), the Colorado Department of Revenue announced an update to their Allowance table on April 2, 2018 (effective April 1, 2018). This required an update to Costpoint Compute Payroll, which can only be released through a System JAR in Costpoint version 7.0.1.

System JAR 049 for Costpoint 7.0.1 and **System JAR 028 for Costpoint 7.1.1** introduced a much needed change to the State Filing Statuses in Costpoint. Rather than using filing statuses that only applied to Costpoint (Both, Miscellaneous 1, Miscellaneous 2, etc.) and had to be manually mapped to each state's actual filing statuses, Costpoint 7.0.1 and 7.1.1 have been updated to use each state's actual filing status(es). Though the new filing statuses were

introduced in April 2017, Deltek will continue to support tax table updates based on the original state filing statuses for the remaining 2018 tax updates. Any tax updates for 2019 will only support the new state filing statuses that were introduced in System JAR 049 for 7.0.1 and System JAR 028 for 7.1.1 (both released in April 2017).

Paid Family Leave Phase 2: Ability to Compute Leave for a Single Leave Type

This Costpoint enhancement will allow HR Administrators to compute leave accruals for a single leave type in the Compute Leave (LDPCLHF) application. This can be useful if you need the employee to have an accrual before timesheets are entered or imported. For example, You can use this functionality if your employee has a leave type for Paid Family Leave that must be accrued before it can be charged on timesheets, but the employee also has a leave type that is based on hours worked and must be computed after timesheets are entered or imported.

Screen Updates

The Costpoint release applies the corresponding updates to the following screens for this feature:

Compute Leave Accruals

The screen now allows you to compute leave accruals for all or a single leave type. To support this functionality, the following **Leave Type** fields are now available in the **Selection Range** group box:

- **Range Type** — From the drop-down list, select the range of leave types to be computed. Valid options are **All** or **One**.
Select **One** when you have a leave type that must be computed before or after an employee's other leave types. If you select **One** as the range type, enter the leave type to be computed in the leave type **Start** field.
- **Start** — If you select **One** in the **Range Type** field, enter, or use Lookup to select, the leave type to be computed. This field is enabled only if the **Leave Type - Range Type** is **One**.

Note: If your employee has multiple leave types and you only compute leave for one of those leave types, you will still be able to compute the other leave types in the future. However, please note that the same leave type cannot be posted to Leave History more than once for the same employee and leave period.

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
People	Leave	LDPCLHF	Compute Leave Accruals	cp711_ldpclhf_015.zip

Materials Management

Organization Security

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Production Control (PC), Purchasing (PO), and Receiving (RC) modules. This feature ensures that correct user access is applied to the logged-in user ID in accessing parts, projects, requisitions, and purchase orders by validating and filtering records/transactions as authorized for the user ID.

Patch and System JAR Requirement

These enhancements require the following:

Costpoint

- Costpoint 7.1.1 System JAR 041 (cp711_sys_041.zip)
- PATCH3390
- PATCH3397
- PATCH3405
- PATCH3403
- PATCH3413
- PATCH5109
- PATCH5111
- PATCH5118
- PATCH5119

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	PC	Manage Manufacturing Orders	PCMMOMNT	cp711_pcmmomnt_030.zip cp711_cmnlb_PCMMOLIB_010.zip cp711_cmnlb_MMORGSECLIB_001.zip
Materials	PC	Expedite Manufacturing Orders	PCMMEXPD	cp711_pcmmexpd_010.zip cp711_cmnlb_PCMMOLIB_010.zip cp711_cmnlb_MMORGSECLIB_001.zip
Materials	PC	Enter Manufacturing Order Issues	PCMMOIS	cp711_pcmmois_023.zip cp711_cmnlb_MMORGSECLIB_001.zip
Materials	PC	Print Manufacturing Order Documentation	PCRMODC	cp711_pcmodc_011.zip cp711_cmnlb_MMORGSECLIB_001.zip
Materials	PC	Create MO Subcontractor	PCMSCRQ	cp711_pcmscrq_015.zip cp711_cmnlb_MMPFPOLIB_005.zip cp711_cmnlb_MMORGSECLIB_001.zip
Materials	PC	Enter Manufacturing Order Reliefs	PCMRELMO	cp711_pcmrelmo_020.zip cp711_cmnlb_MMORGSECLIB_001.zip
Materials	PC	Manage MO Operation Completions	PCMCOMP	cp711_pcmcomp_001.zip cp711_cmnlb_MMORGSECLIB_001.zip cp711_cmnlb_PCMSFR_006.zip

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Domain	Module	Application Name	Application ID	Application File
Materials	PC	Manage MO Quality Control Inspection Results	PCMINSP	cp711_pcminsp_001.zip cp711_cmnlbr_MMORGSECLIB_001.zip cp711_cmnlbr_PCMSFR_006.zip
Materials	PC	Print MO WIP Variance Analysis Report	PCRWIPV	cp711_pcrwipv_003.zip
Materials	PC	Create MO WIP Variance Journal Entry	PCPWIPV	cp711_PCPWIPV_007.zip
Materials	PC	Print Manufacturing Order Component Shortage Report	PCRSHT	cp711_pcrshrt_005.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	Print Manufacturing Order Cost Report	PCRMOCST	cp711_pcrmocst_008.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	View Manufacturing Order Status	PCQMOST	cp711_pcqmost_010.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	Update Manufacturing Order Costs Labor Costs	PCMMOLAB	cp711_pcmmolab_008.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	Update Manufacturing Order Costs	PCMMCOST	cp711_pcmmcost_004.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	Load MO WIP Accounts	PCPTOOL	cp711_pcptool_003.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	Compute Material Requirements	PCPMRR	cp711_pcpmrr_015.zip cp711_cmnlbr_MMPFPOLIB_005.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	Manage Planners	PCMPLNR	cp711_pcmplnr_003.zip cp711_cmnlbr_MMORGSECLIB_001.zip
Materials	PC	Load Organizations IDs	PCPLDORG	cp711_pcpldorg_001.zip
Materials	PC	Manage Inventory Abbreviation Peggings	MRMIAPEG	cp711_mrmiapeg_006.zip cp711_cmnlbr_MMORGSECLIB_001.zip

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Domain	Module	Application Name	Application ID	Application File
Materials	PO	Manage Purchase Orders	POMMAIN	cp711_pommain_037.zip
Materials	PO	Print Purchase Orders	PORPPO	cp711_porppo_021.zip
Materials	PO	Manage Buyers	POMBUY	cp711_pombuy_004.zip
Materials	PO	Update Subcontract Retainage PO Status	POMSCST	cp711_pomscst_009.zip
Materials	PO	Approve Pending Purchase Orders	POMSTAT	cp711_pomstat_011.zip
Materials	PO	Approve Pending Purchase Orders	POMRELS	cp711_pomrels_020.zip
Materials	PO	Expedite Purchase Orders	POMEXPD	cp711_pomexpd_010.zip
Materials	PO	View Purchase Order Change Orders	POQCHNG	cp711_poqchng_008.zip
Materials	PO	Archive Purchase Orders	POPARCH	cp711_poparch_011.zip
Materials	PO	Manage Purchase Orders Expediting Notes	POMEXPN	cp711_pomexpn_003.zip
Materials	PO	Print Purchase Order Expediting Report	POREXPD	cp711_porexpd_007.zip
Materials	PO	Create Purchase Order Change Orders	POMCHNG	cp711_pomchng_015.zip
Materials	PO	Print Purchase Order Change Orders	PORPCO	cp711_porpco_016.zip
Materials	PO	Manage Statement of Work	POMSOW	cp711_pomsow_002.zip
Materials	PO	Change Purchase Order Type	POPTYPE	cp711_poptype_004.zip

Domain	Module	Application Name	Application ID	Application File
Materials	PO	Print Purchase Order Activity Report	PORACTV	cp711_poractiv_008.zip
Materials	PO	Print Purchase Order Register Report	PORREG	cp711_porreg_008.zip
Materials	PO	View Item Purchasing Information	POQITEM	cp711_poqitem_009.zip
Materials	PO	Load Organization IDs	POPLDORG	cp711_popldorg_001.zip
Materials	PP	Create Purchase Orders	PPPGPO	cp711_pppgpo_021.zip
Materials	RC	Manage Quality Control Inspections	RCMINSP	cp711_rcminsp_023.zip
Materials	RC	Print Receipt Traveler	RCRTRVLR	cp711_rcrtrvlr_010.zip
Materials	RC	Manage Purchase Order Receipts	RCMPORC	cp711_rcmporc_023.zip
Materials	RC	Print Pending Inspection Report	RCRPINSP	cp711_rcrpinsp_004.zip
Materials	RC	Print Receiving Log	RCRLOG	cp711_rcrlog_005.zip
Materials	RC	Manage Vendor Returns	RCMRTRN	cp711_rcmrtrn_017.zip

For more information about the Organization Security for the Production Control, Purchasing, and Receiving modules of the Materials domain, see the *Deltek Costpoint 7.1.1 Release Notes: Organization Security – Production Control, Purchasing, and Receiving* document.

Load Organization IDs (PPPLDORG)

Use this new screen (**Materials » Procurement Planning » Procurement Planning Utilities » Load Organization IDs**) to load requisitioner's organization to a requisition where the field is left blank. This utility will not overwrite existing requisition organization in requisition records.

Note: You must run this utility before turning on organization security for a module. If you skip this process, query result will exclude transactions with blank organization IDs

Load Organization IDs (ECPLDORG)

Costpoint

Use this new screen (**Materials » Engineering Change Notices » ECN Utilities » Load Organization IDs**) to load originator's organization to Engineering Change Notice (ECN) where the field is left blank. This utility will not overwrite existing originator organization in ECN records.

Note: You must run this utility before turning on organization security for a module. If you skip this process, query result will exclude transactions with blank organization IDs

DVGMRSUBLIB Library

The DVGMRSUBLIB library contains common business logic which is shared by the following applications:

- Manage MRP Action Messages (MRMACTM)
- Manage Master Production Schedule Action Messages (MSMACTM)
- Manage Detailed Part Schedule (MRMDTPT)
- Manage Master Production Schedules (MSMMPS)
- View Summary Part Availability (MRQSPA)

Application JAR Requirement

The following table shows the required application JAR affected by this update.

Domain	Application Name	Application JAR
Materials	Manage Detailed Part Schedule (MRMDTPT)	cp711_mrmdtpt_017.zip

System JAR Requirements

The following Costpoint 7.1.1 system jar files and patch are required for this update:

- cp711_cmnlbr_DVGMRSUBLIB_001.zip
- cp711_sys_041.zip

Administration

View Help About (SYMABOUT)

The Features subtask in View Help About (SYMABOUT) now includes the Organization Security feature for the Purchasing, Receiving, and Production Controls module.

Reports & Analytics

Manage CER Settings

The new Manage CER Settings (BIMCERSETTINGS) screen has been added in preparation for an upcoming change to Costpoint Enterprise Reporting (CER). This screen would allow the selection of the data source for project budget reporting in CER which can either be Costpoint or Budgeting and Planning. You can also enable security for future models and reports that will be added to CER.

As default, model security will be enabled which at the same time will turn off the Cognos framework model security. You can turn off the model security anytime through this new screen.

Note: Although this screen is already available in the Reports and Analytics domain, it has no impact on the current functionality of CER yet. A future version of CER will be required for this screen to take effect

System Requirements

This enhancement requires the following:

- PATCH3324.sql
- PATCH3402.sql
- PATCH7149.sql

Application JAR Requirement

Domain	Module	Application ID	Application Name	Application File
Reporting & Analytics	Configuration	BIMCERSETTINGS	Manage CER Settings	cp711_bimcersettings_001.zip

Budgeting and Planning

Project Budgeting

Import Multiple Budgets/EACs from Excel

A new **Projects » Project Budgeting » Controls and Utilities » Import Budget/EACs from Excel** utility was added that enables you to import multiple project budgets and EACs from Excel and then upload them to the Project Budgets/EACs application.

The Excel template has been formatted by Deltek for this purpose. The template, available from the Excel Template subtask, includes column headings that correspond to fields within the Project Budgets/EACs application.

Previously, you could only import projects one at a time using the Import Budget/EAC from Scheduling App (BPU1, BPU3, BPU5, NPU1) screen. The ability to import multiple project budgets/EACs is presently limited to Excel.

The Import Budget/EACs from Excel application provides users with the capability to perform the following functions:

- Download the pre-formatted Excel template.
- Upload data from Excel to Budgeting & Planning.
- Select error reporting and duplication parameters, and after the upload is finished, review the results in the Upload Report subtask prior to uploading the data to the Project Budgets/EACs application.
- Review errors using the Error Report subtask.
- Commit multiple budgets simultaneously to Budgeting and Planning.

Administrator Prerequisites

Information in this section applies primarily to system administrators.

- Users must save the completed template as an .xml data file prior to upload.

If the .xml file extension does not exist in the File Upload Limits table of the Admin » System Administration » System Administration Controls » Configure System Settings screen, it must be added.

- Users must save the .xml file to a specified Alternate File Location for the application to access it for processing. If you have not yet configured the Alternate File Location, see online help for **Administration » System Administration » File Management » Manage Alternate File Locations**. See also the note in the *Preparing Your Data for Upload* section below. If a common network location will be used for this purpose that location should be made known to users of this application.
- An **Import Budget/EACs from Excel Commit Flag Default** check box was added to **Admin » Budget Administration » Administration Controls » Configuration Settings (MAM10) » Project** tab. When you select this option, the **Commit** check box on the Upload Report subtask is selected by default, but the user can change the status.

Preparing Your Data for Upload

To upload your data into the Import Budget/EACs from Excel utility, you must start by entering your project budgets/EACs into a Deltek-formatted Excel template. A link to the template is available from the **Excel Template** subtask on the Import Budget/EACs from Excel screen.

To download the Excel template, complete the following steps:

Budgeting and Planning

1. Click Projects » Project Budgeting » Controls and Utilities » Import Budget/EACs from Excel to display the utility.
2. Click the Excel Template subtask link.
3. In the Excel Template subtask, copy the URL and paste it into a web browser.
4. Save the template to your specified location.

To finalize the template for use in the Import Budgets/EACs from Excel utility, complete the following steps:

1. Enter budget/EAC data in the spreadsheet.
2. In Excel, save the template as an .xml file type. If you are unfamiliar with this process, refer to the Excel online help.

To be uploaded within the Import Budget/EACs from Excel utility, the .xml file must be available in a preconfigured location within Costpoint, referred to as an Alternate File Location.

When you save the template as an .xml file, you must either save it to the Alternate File Location, or copy it there using File Upload on the Process menu. If you do not know the Alternate File Location, check with your System Administrator.

Upload and Process Your Data

In the **Import Budget/EACs from Excel** screen, you will set validation parameters, select error report settings, and then select the location where the .xml file was saved.

The screenshot shows the 'Import Budget/EACs from Excel' utility window. It contains several input fields and a button. Callout boxes provide instructions for each:

- Top Callout:** Use the drop-down lists in this section to specify parameters for handling duplicate budgets and errors. (Points to the two '-Select-' dropdown menus.)
- Location Callout:** Use this field to specify the Alternate File Location where your budget XML file resides. (Points to the 'Location' text box.)
- Name Callout:** Select the .xml file for uploading to Budgeting and Planning. (Points to the 'Name' text box.)
- Buttons Callout:** Use these subtasks to display your uploaded report results, errors, and to download the Deltek-formatted XML template. (Points to the 'Upload Report', 'Error Report', and 'Excel Template' buttons.)



The interface includes the following elements:

- Two dropdown menus for validation parameters.
- A 'Location' text box.
- A 'Name' text box.
- An 'Upload File' button.
- Three subtask buttons: 'Upload Report', 'Error Report', and 'Excel Template'.

To import multiple budgets/EACs, complete the following steps:

1. From the **If a Budget/EAC already exists, do you want validations to create an error when Uploading File?** drop-down list, choose one of the following:
 - **Yes** — If a budget/EAC already exists an error will result.
 - **No** — If you select this option, proceed to Step 2.
2. From the **If a Budget/EAC already exists, do you want to** drop-down list, choose one of the following

- **Overwrite entire Budget/EAC** — For Budgets, the budget for the entire period of performance, including past, current and future periods, will be overwritten by the .xml uploaded file
 - If the existing Budget/EAC status is *Complete*, *Incomplete*, or *Working*, a *Working* version is created with the same version number. The old copy of the version remains available to view until the new *Working* version is committed.
 - If the existing Budget/EAC is 'Approved,' a new *Working* version will be created with a new version number.

This field is disabled if you select **Yes** from the **If a Budget/EAC already exists, do you want validations to create an error when Uploading File?** drop-down list.
 - **Append current and future periods** — For Budgets/EACs, the current and future period Budget will be updated by the .xml upload. Prior Periods will not be changed. If an .xml file is uploaded with Prior Period changes, then an error is created during validation
3. From the **If validation finds an error** drop-down list, choose one of the following:
 - **Fail all – view items in error report** - All .xml lines will fail if a single error is found.
 - **Upload passes – view failed items in error report** - Only .xml line items not included in the error report are uploaded, with the rest displayed in the error report.
 4. Upload the .xml data using one of the following methods:
 - In the **Location** field, click  to select the location from the list of Alternate File Locations already designated within Costpoint, and in the **Name** field, click  to select the file.
 - On the Process menu, click **File Upload**, and in the File Upload Manager screen, click **Browse** to select the .xml file.
 5. Click Upload File.
 6. If errors occur, click the Error Report subtask link to view them.

Reviewing Errors and Uploading Using the *Upload Report Screen*

After the .xml file is successfully uploaded in the Import Budget/EACs from Excel screen, it is automatically processed. Depending on validation settings, the Budgets/EACs that did not contain errors are either uploaded immediately to the Project Budgets/EACs application as budgets with a *Working* status, or all the budgets/EACs fail if any errors exist.

The Upload Report subtask displays the budgets/EACs that were successfully uploaded. From that same subtask, you can also commit selected budgets/EACs. After you commit, the status of the uploaded budget/EAC in the Project Budgets/EACs application changes from *Working* to *Incomplete*.

You can review error messages on the Error Report subtask. Using the information available on this subtask as a guide, you can make corrections to your original entries in the Excel template, and then re-run the process until you have successfully imported all Budgets/EACs into the Project Budgets/EACs application.

Error Report Subtask: Review Upload Errors

After the budgets and EACs in the .xml file are processed, any of those that failed display on the Error Report subtask.

Fields that display on the Error Report subtask are identical to those in the Excel template.

The Error Report Subtask table displays ten columns to help you identify and address budget errors:

- Project ID/Period End Date
- ID Type
- ID
- Pool Org ID

Budgeting and Planning

- Account ID
- PLC
- Rate
- Hours
- Amount
- Detailed Error Message

Use the **Expand All** and **Collapse All** buttons to maximize and minimize the error list.

Upload Report Subtask: Review the Budget Date Upload Results

You can use the Upload Report subtask to view the result set after the upload completes. The subtask table includes five columns:

- **Project ID** – this column displays one row per Project ID uploaded.
- **Errors** – this column displays one of two values:
 - Yes indicates that the project budget has partially uploaded but has errors.
 - No indicates that the project budget has completely uploaded.

The Error Report subtask is operative only if users have selected the *Upload passes – view failed items in error report* option in the **If validation finds an error** dropdown list. The other available option is for all to fail on validation error

- **Budget Type** – This column displays the budget type (BUD or EAC).
- **Version** – This column displays either the version number of the Working budget/EAC that will be overwritten or the version number of the newly created budget/EAC that will be committed in the Upload Budgets/EACs process.
- **Commit** – This column displays a check box that is selected, or left clear, by default. Though the default setting is specified in the Configuration setting, it can be modified here.
- Click **Upload File** to update budgets and EACs.

Requirements

The enhancement requires cp711_bnp_common_006.zip.

Budget by Resource

The **Add/Edit/Delete Assignments** subtask in **Budget By Resource** now includes a **Type** column where you can select the type of budget. After you click **New** in the subtask, you will have to select the Budget Type. Choose from **Project**, **Proposal** or **Non-Backlog** budget type.

Also, the **Source** column now displays BUD (Project Budget), EAC, PRP (Proposal) or NBL (Non-Backlog).

A Query was added to the result set screen to further filter the results. The query criteria are the column headers.

Application JAR Requirements

Budgeting and Planning

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

Domain	Module	Application ID	Application Name	Application File
Projects	Project Budgeting	bnp_bgmbpir.htm	Budget by Resource	cp711_bnp_common_008.zip

Budgeting Administration

Changes to Configuration Files

As Budgeting & Planning 7.0 is now integrated into the Costpoint database, many of the Configuration Settings are duplicates of settings already in Costpoint.

In this release, files associated with configuration changes were modified to avoid redundancy and unused codes were removed due to obsolete values.

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
Admin	Budgeting Administration	BNP_BAMMAM10	Configuration Settings (MAM10)	cp711_bnp_common_008.zip
Admin	Budgeting Administration	BNP_BAMMAP1	Manage Project Direct Cost Type Table (MAP1)	cp711_bp_bnp_bammap1_001.zip
Admin	Budgeting Administration	BNP_BAPREFRESH	Refresh Process	cp711_bp_bnp_baprefresh_006.zip Dependent File: cp711_bnp_common_005.zip;cp711_bp_patch1280_001.zip
Accounting	Organizational Budgeting	BNP_BGMAOM3	Organization Budget Cycle Initialization (AOM3)	cp711_bp_bnp_bgmaom3_003.zip
Accounting	Organizational Budgeting	BNP_OAQXOPX	Plug Project Review (NOP1,NOI1,AOP1,AOP2,AOP3)	cp711_bp_bnp_oaqxopx_001.zip
Projects	Project Budgeting	BNP_SRQSPA5	Project Status (SPA5)	cp711_bp_srqsapa5_002.zip
Accounting	Organizational Budgeting	BNP_OAPAOI1	Compute Forward Rates (AOI1)	cp711_bp_bnp_oapaoi1_002.zip
Projects	Project Budgeting	BNP_BGMBPUX	Import Budget - EAC From Scheduling App (BPU1,BPU3,BPU5,NPU1)	cp711_bp_bnp_bgmbpux_003.zip

Changes to Project Tab

The Project Budget Account Type field and drop-down menu was removed from the Project tab of Configuration Settings (MAM10) because in Budgeting & Planning 7.0, the Project Account Group (PAG) from the Costpoint project setup will be used by budgeting.

Budgeting and Planning

Configuration Settings (MAM10)

Account	Display	General	Integration	Organization	Project
Project Budget Period Method *		Accounting Periods/Sub Periods ▼			<input type="checkbox"/> Unlock EAC Last Closed Period
Project Account Group Code					<input checked="" type="checkbox"/> Resource Budget Commit Flag Default
Auto Plug Calculation *		On ▼			<input checked="" type="checkbox"/> Import Budget/EACs from Excel Commit Flag Default
Timesheet Import History *		36 Months			
Timesheet Schedule Code		STFR			
Labor Escalation Month *		Employee's Anniversary Date ▼			
Labor Escalation Value *		200.00%			
Workforce Rule *		Enforce ▼			

Time and Expense

Time

There are no updates in this area.

Expense

There are no updates in this area.

Configuration

There are no updates in this area.

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