Deltek Costpoint® 7.1.1

System Jar 027

April 12, 2017

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Contents

Overview

This document is a compilation of the release notes distributed for the enhancements included as part of system jar 027.

Deltek Costpoint HotFix Readme

Multiple Due Dates Feature (Delivery Schedule Subtask)

Enhancements were made in preparation for the future implementation of the new feature.

This feature provides you the ability to split the purchase order (PO) line ordered quantities to multiple delivery dates.

A new Delivery Schedule subtask has been added to several screens as part of this new feature.

PATCH2959 is required for this update.

Configure Project Manufacturing Settings (PCMPMFG)

A drop-down list has been added to this new screen to allow users to specify the MES version and other defaults used in PMFG export application.

PATCH3132 and PATCH7120 are required for this update.

These enhancements have no impact on current functionality.

The functionalities of these updates/enhancements are not available until the full feature is released.

Accommodate Requisition Settings Option in Setup Company (SYPCOMP)

When a new company is set up, the system will look into the value of the new field in the Configure Purchase Requisition Settings (PPMRQSET) application. The new field allows orders with different due dates to be combined into a single requisition line.

In addition, the following Costpoint 7.1.1 jar file and patches are required for this update:

- cp711_sypcomp_012.zip
- PATCH3132
- PATCH7120

MPS Forecast Allocations to Sales Orders

MPS Forecast Allocations to Sales Orders enables users to enter sales orders (SO) ahead of forecasts and have the sales orders allocated to the forecasts once entered.

This feature is primarily for users who manufacture long lead time items and receive actual demand/sales orders. In these situations, for planning demand to be accurate, previously entered sales orders need to consume the MPS forecasted quantities. This feature helps prevent over-planning and reduce manual intervention or manipulation of forecasts.

In the Materials domain, a new utility screen, Update MPS Forecast Consumption (MSPFCST), has been added to update the consumption of MPS forecast quantities by sales order line quantities. The Process of updating MPS forecast consumption finds sales order lines based on specified parameters previously determined in the utility and allocates them according to forecast. In addition, a new check box, **Allow Change of Consumed Forecast Qty on SO lines with Reservation**, has been added to allow users to edit consumed forecast quantities in the Consume Forecast subtask.

In the Administration domain, new logic has been added to copy the value of the new check box (**Allow Change of Consumed Forecast Qty on SO lines with Reservations**) on the Configure Master Production Scheduling Settings screen when creating a new company by copying an existing company.

Patch and System JAR Requirements

These enhancements require cp711_sys_027.zip.

In addition, these patches are required for this release:

- PATCH3113
- PATCH5075
- PATCH7118

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
Administration	SY	Set Up Company	SYPCOMP	cp711_sypcomp_011.zip
Materials	MS	Configure Master Production Scheduling Settings	MSMSET	cp711_msmet_001.zip
Materials	OE	Manage Sales Orders	OEMNTSO1	cp711_oemntso1_002.zip
Materials	OE	Manage Sales Orders Supervisor Screen	OEMNTSO1	cp711_oemntso2_002.zip
Materials	OE	Approve Sales Orders	OEMAPPSO	cp711_oemappso_006.zip
Materials	MS	Update MPS Forecast Consumption	MSPFCST	cp711_mspfcst_001.zip
Materials	OE	Import Sales Orders	AOPSOPP	cp711_aopsopp_010.zip

Affected Applications

Set Up Company (SYPCOMP)

New logic has been added to this application to copy the value of the new check box (**Allow Change of Consumed Forecast Qty on SO lines with Reservations**) on the Configure Master Production Scheduling Settings screen when creating a new company by copying an existing company.

View Help About (SYMABOUT)

The MPS Forecast Allocations to Sales Orders feature has been registered on this screen.

Configure Master Production Scheduling Settings (MSMSET)

A new check box, **Allow Change of Consumed Forecast Qty on SO Line with Reservations**, has been added to the screen to allow editing of consumed forecasts on sales order lines with reservations. If this check box is selected, you can modify previously saved forecast consumptions against an SO line. This allows you to consume forecasts that have been entered after SO lines were entered and reservations created. This also allows you to consume additional available forecasts when SO line quantity is increased after original consumptions have been saved and reservations created.

This new check box is for manual changes only. Even if manual edits are not allowed when a reservation exists (when MPS Settings – **Allow Change of Consumed Forecast Qty on SO lines with Reservations** is cleared), the Update MPS Forecast process will still update the forecasts as long as Consume Forecast = Y for the SO line.

Update MPS Forecast Consumption (MSPFCST)

Use this new screen (**Materials » Master Production Scheduling » Master Production Schedules » Update MPS Forecast Consumption**) to update the consumption of MPS forecast quantities by sales order line quantities.

This screen finds valid sales order lines (based on screen selections) and allocates the forecast to them depending on reservation quantities and ship dates. If opted on the screen, existing consumptions can be overwritten based on the current forecast.

This process should be able to run from the process manager. Multiple users can access the screen at the same time, but only one user is allowed to run the process at a time.

This process updates forecast consumptions for a single company which matches that of the logged in user.

Manage Sales Orders (OEMNTSO1)

New logic has been added to this application to allow editing of consumed forecast quantities in the Consume Forecast subtask, if the **Allow Change of Consumed Forecast Qty on SO lines with Reservations** option is selected on the Configure Master Production Scheduling Settings screen.

Manage Sales Orders Supervisor Screen (OEMNTSO2)

New logic has been added to this application to allow editing of consumed forecast quantities in the Consume Forecast subtask, if the **Allow Change of Consumed Forecast Qty on SO lines with Reservations** option is selected on the Configure Master Production Scheduling Settings screen.

Approve Sales Orders (OEMAPPSO)

New logic has been added to this application to allow editing of consumed forecast quantities in the Consume Forecast subtask, if the **Allow Change of Consumed Forecast Qty on SO lines with Reservations** option is selected on the Configure Master Production Scheduling Settings screen.

Import Sales Orders (AOPSOPP)

New logic has been added to this application to allow editing of consumed forecast quantities in the Consume Forecast subtask, if the **Allow Change of Consumed Forecast Qty on SO lines with Reservations** option is selected on the Configure Master Production Scheduling Settings screen.

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.

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 requires 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 the Compatibility View for the browser. Click **Tools » Compatibility View settings**, and clear the **Display intranet sites in Compatibility View** check box. And then, refresh the browser. Make sure you remove deltek.com (if listed) from the websites you have added to the Compatibility View list.

Extensibility Enhancement: Ability to Create New Applications

In a previous release, a new application, View User Extensions Inquiry (SYQUSRXT), was rolled out as part of the this Extensibility enhancement. The new screen allows you to view active extensibility units assigned to a user or user group across all user groups and user interface profiles associated with the user or user group.

In this release, the following Administration screens have been updated to support new Extensibility applications once these applications are supported by Framework:

- **Activate/Inactivate Organization Security by Module (SYMORGFN)** — The Applications table window has been modified to include new Extensibility applications. Users should be able to apply organization security (through the Apply Org Security check box) to a new Extensibility application if the organization security is applicable to that application.
- **Configure Application Batch Job Settings (PMMSETNG)** — This application has been modified to allow you to configure new Extensibility applications for batch job processing.
- **Configure User Preferences (UPMUSRPR)** — The My Menu subtask has been updated to include new Extensibility applications if selected from My Menu Application List.
- **Manage Application/Content Links (SYMCMIAL)** — This application has been updated to allow users to link content to new Extensibility applications.
- **Manage Content Types (SYMCMICT)** — The Linked Content Files subtask has been modified to display new Extensibility applications.
- **Manage Extensibility Units (SYMXTAU)** — The Applications subtask has been modified to display new Extensibility applications that are part of extensibility units. The screen is also updated to include new Extensibility applications in rebuilding user menu.

- **Manage Job Queues (PMMQUE)** — The Scheduled Jobs table window has been modified to display new Extensibility applications.
- **Manage Jobs (PMMPROC)** — In the Job Operations table window, the Application field lookup has been updated to include new Extensibility applications.
- **Manage User Interface Profiles (SYMPROF)** — The My Menu subtask has been updated to display and enable entry of new Extensibility applications in the My Menu setup. The screen is also updated to include new Extensibility applications in rebuilding user menu.
- **Manage Users (SYMUSR) and Manage User Groups (SYMGRP)** — The Application Rights and Result Set Rights by Application subtasks have been modified to display and save rights for new Extensibility applications. These screens are also updated to rebuild menu for Extensibility applications whenever the UI Profiles subtask is changed.
- **Print Effective User Rights Report (SYREFFUR)** — This application has been updated to display setup rights for new Extensibility applications on the Effective User Rights Report.
- **Print Job Report (PMRPROC)** — This application has been modified to print jobs that have new Extensibility applications set up.
- **Print Menu Report (SYRMENU)** — This application has been updated to display new Extensibility applications on the Menu Report.
- **Print My Menu Report (SYRMYMEN)** — This application has been updated to include new Extensibility applications when generating a report containing users' My Menu settings.
- **Print User Group Rights Report (SYRGRPR)** — This application has been updated to display setup rights for new Extensibility applications on the User Group Rights Report.
- **Update Job Status (PMMCMPS)** — The Scheduled Jobs table window has been modified to display new Extensibility applications.
- **View Action and Report Status (SYQJSTAT and SYQJSTAT2)** — The Application field lookup on the main screen has been updated to include new Extensibility applications. The Job Step Details table window has also been modified to correctly display the status of new Extensibility applications.
- **View Help About (SYMABOUT)** — The Open Applications subtask has been modified to display new Extensibility applications.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 027 (cp711_sys_027.zip)
- PATCH7119
- PATCH7123

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
Administration	SY	Configure User Preferences	UPMUSRPR	cp711_upmusrpr_005.zip
Administration	SY	Manage Application/Content Links	SYMCMIAL	cp711_symcmial_002.zip
Administration	SY	Manage Content Types	SYMCMICT	cp711_symcmict_004.zip
Administration	SY	Manage Extensibility Units	SYMXTAU	cp711_symxtau_001.zip
Administration	SY	Manage User Interface Profiles	SYMPROF	cp711_symprof_001.zip
Administration	SY	Print Menu Report	SYRMENU	cp711_syrmenu_001.zip
Administration	SY	Print My Menu Report	SYRMYMEN	cp711_syrmymen_001.zip
Administration	SY	View Action and Report Status	SYQJSTAT2	cp711_syqjstat2_001.zip
Administration	SY	View Help About	SYMABOUT	cp711_symabout_005.zip
Administration	SS	Activate/Inactivate Organization Security by Module	SYMORGFN	cp711_symorgfn_001.zip
Administration	SS	Manage User Groups	SYMGRP	cp711_symgrp_002.zip
Administration	SS	Manage Users	SYMUSR	cp711_symusr_010.zip
Administration	SS	Print Effective User Rights Report	SYREFFUR	cp711_syreffur_002.zip
Administration	SS	Print User Group Rights Report	SYRGRPR	cp711_syrgrpr_002.zip
Administration	PM	Configure Application Batch Job Settings	PMMSETNG	cp711_pmmsetng_001.zip
Administration	PM	Manage Job Queues	PMMQUE	cp711_pmmque_001.zip
Administration	PM	Manage Jobs	PMMPROC	cp711_pmmproc_001.zip

Domain	Module	Application Name	Application ID	Application File
Administration	PM	Print Job Report	PMRPROC	cp711_pmrproc_001.zip
Administration	PM	Update Job Status	PMMCMPS	cp711_pmmcmps_001.zip
Administration	PM	View Action and Report Status	SYQJSTAT	cp711_syqjstat_001.zip

Ability to Set Up Project Modification Descriptions

Costpoint now allows you to standardize project modification descriptions for reporting purposes. One new application has been created and several others have been updated so you can set up labels that could be used to standardize the modification descriptions.

Manage Modification Descriptions (PJMMODDC)

Use this new application to set up modification descriptions for your project modifications. Modification descriptions defined on this screen and marked as **Active** are the only ones available for entry and selection in the Description field on the Manage Modifications, Manage Project User Flow, and Manage Alternate Project Revenue Profiles screens if the **Validate Modification Descriptions** check box is selected on the Configure Project Settings screen.

You can create the same description for multiple companies as long as the **Use for All Companies** check box for that description is not selected on this screen. However, you cannot set up the same description multiple times in one company, for all companies, or in a specific company if that description already exists for all companies. Even if you enter the same description in a different case (for example, **INITIAL** and **Initial**), Costpoint considers it as a duplicate description and you will not be able to save the record.

You can access this screen through **Projects » Project Setup » Project Setup Controls » Manage Modification Descriptions**.

Configure Project Settings (PJMSETNG)

A new check box, **Validate Modification Descriptions**, has been added to this screen. Select this check box to enforce validation of project modification descriptions for a particular company.

You can define modification descriptions on the Manage Modification Descriptions screen whether or not the **Validate Modification Descriptions** check box is selected. Once you select this check box, however, you must set up modification descriptions on the Manage Modification Descriptions screen, and only those descriptions can be used for new modifications or as replacement descriptions for existing modifications.

Manage Modifications (PJMMOD), Manage Project User Flow (PJMBASIC), and Manage Alternate Project Revenue Profiles (PJMALTPJ)

These applications have been modified to take into account the value of the **Validate Modification Descriptions** check box in Configure Project Settings. If this check box is not selected, Costpoint will not perform validation on project modification descriptions, and you can enter any description in the **Description** field on the Manage Modifications screen and on the Modifications subtask of the Manage Project User Flow and Manage Alternate Project Revenue Profiles screens.

If the **Validate Modification Descriptions** check box is selected, Costpoint will validate modification descriptions against records that are set up on the Manage Modification Descriptions screen for the user's logged-in company or any records with the **Use for All Companies** check box selected in Manage Modification Descriptions. In addition, only modification descriptions marked as **Active** in Manage Modification Descriptions will be available for entry and selection in the **Description** field in Manage Modifications, Manage Project User Flow, and Manage Alternate Project Revenue Profiles.

Mass Add Project Master Data (PJPMADD)

When you select **Project Modifications** in the **Include** list box and if the **Validate Modification Descriptions** check box is selected on the Configure Project Settings screen, this application now validates modification descriptions of the records you are adding or updating against records on the Manage Modification Descriptions screen.

Import Project Master Data (PJPPREP)

If the **Validate Modification Descriptions** check box is selected on the Configure Project Settings screen and you are importing data with project modifications, this application now validates modification descriptions against records on the Manage Modification Descriptions screen.

Set Up Company (SYPCOMP)

This application has been updated to copy the value of the new check box (**Validate Modification Descriptions**) added to the Configure Project Settings screen when creating a new company by copying an existing company.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 027 (cp711_sys_027.zip)
- PATCH3166
- PATCH7124

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
Projects	PJ	Manage Modification Descriptions	PJMMODDC	cp711_pjmmoddc_001.zip
Projects	PJ	Configure Project Settings	PJMSETNG	cp711_pjmsetng_007.zip
Projects	PJ	Manage Modifications	PJMMOD	Not applicable

Domain	Module	Application Name	Application ID	Application File
Projects	PJ	Manage Project User Flow	PJMBASIC	cp711_pjmbasic_019.zip
Projects	PJ	Manage Alternate Project Revenue Profiles	PJMALTPJ	cp711_pjmaltpj_003.zip
Projects	PJ	Mass Add Project Master Data	PJPMADD	cp711_pjpmadd_005.zip
Projects	PJ	Import Project Master Data	PJPPREP	cp711_pjpprep_015.zip
Administration	SY	Set Up Company	SYPCOMP	cp711_sypcomp_012.zip

Sales Group Abbreviation Cost of Goods Sold Account Split

This feature enables you to break the clearing and cost of goods sold general ledger entries by cost element: Materials, Labor, Subcontract, Misc 1, and Misc 2. These are loaded costs including overhead.

In addition, this feature provides you with the visibility of actual costs by cost element through cost of goods sold and enables you to compare project budgets to actual costs with more granularity and accuracy.

These screens display Acct/Org by Cost Element Info on the Accounts subtask:

- Manage Sales Orders (OEMNTSO1)
- Manage Sales Orders Supervisor Screen (OEMNTSO2)
- Approve Sales Orders (OEMAPPSO)
- Configure Sales Order Entry Settings (OEMSET)

PATCH3161 is required for this update.

Ability to Manually Mark Projects that have been Totally Billed

Costpoint now allows you to manually mark a project as “final billed” in order for you to determine when all billing tasks have been completed for that project and you no longer need to calculate or produce bills for it. The following applications have been updated for this enhancement.

Manage Project Billing Information (BLMINFO)

A new check box, **Final Billing Completed**, has been added to the Setup Information tab of this screen. Select this check box to mark a project as “final billed.” Costpoint takes into account the value of this check box during bills processing.

Calculate Standard Bills (BLPGBILL)

You now have the option to include or exclude projects that have been totally billed in calculating standard bills. On the Options tab of this screen, select the new check box, **Projects with "Final Billing Completed" checked**, to include projects that are marked as "final billed" (that is, the **Final Billing Completed** check box is selected on the Manage Project Billing Information screen for these projects). This check box is clear by default.

Calculate Retroactive Bills (BLPRBIL)

You also have the option to include or exclude final billed projects in computing retroactive bills through the new check box, **Include Projects with "Final Billing Completed"** checked, added to this screen. When you select this check box, Costpoint includes in calculating retroactive bills those projects that have the **Final Billing Completed** check box selected on the Manage Project Billing Information screen. This check box is clear by default.

Import Project Master Data (PJPPREP)

A new column, FINAL_BILL_FL, has been added to the PROJ_BILL_INFO.csv file to store the value of the new check box (**Final Billing Completed**) added to the Manage Project Billing Information screen. This is not required in the input file, but must be **Y** or **N** if populated.

Mass Add Project Master Data (PJPMADD)

This application has been updated to copy the value of the **Final Billing Completed** check box when adding or updating multiple projects if **Project Billing Info** is selected in the **Include** list box.

Patch and System Jar Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 027 (cp711_sys_027.zip)
- PATCH3169

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
Projects	BL	Manage Project Billing Information	BLMINFO	Not applicable
Projects	BL	Calculate Standard Bills	BLPGBILL	cp711_blpgbill_011.zip cp711_cmnlib_calcbills_003.zip
Projects	BL	Calculate Retroactive Bills	BLPRBIL	cp711_blprbil_005.zip

Domain	Module	Application Name	Application ID	Application File
Projects	PJ	Import Project Master Data	PJPPREP	cp711_pjpprep_015.zip
Projects	PJ	Mass Add Project Master Data	PJPMADD	cp711_pjpmadd_005.zip

PCMMOLIB Library

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

- Manage Manufacturing Orders (PCMMOMNT)
- Expedite Manufacturing Orders (PCMMEXPD)

Application JAR Requirements

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

Domain	Application Name	Application JAR
MM	Manage Manufacturing Orders (PCMMOMNT)	cp711_pcmmomnt_021.zip

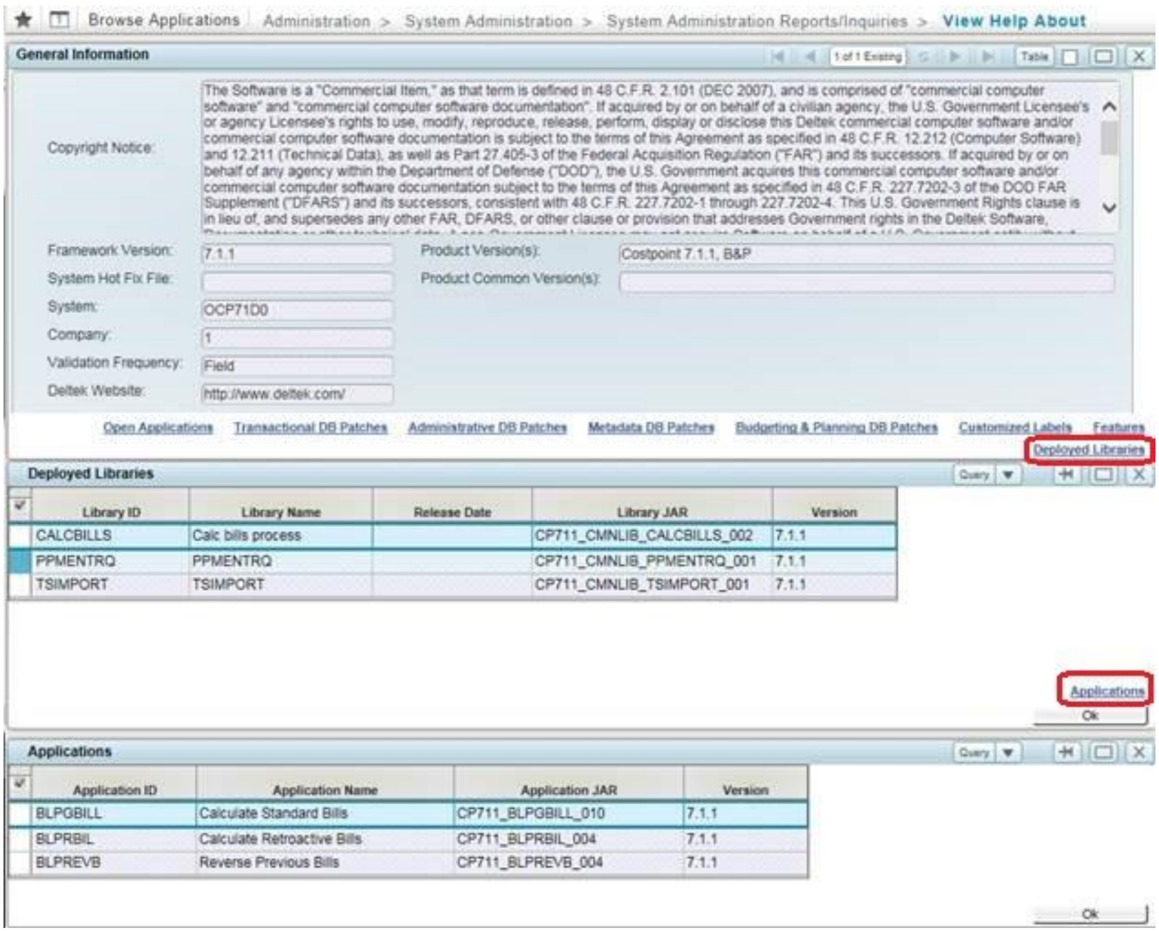
In addition, the following Costpoint 7.1.1 jar files are required for this update:

- cp711_cmnlin_ PCMMOLIB_001.zip
- cp711_sys_027.zip

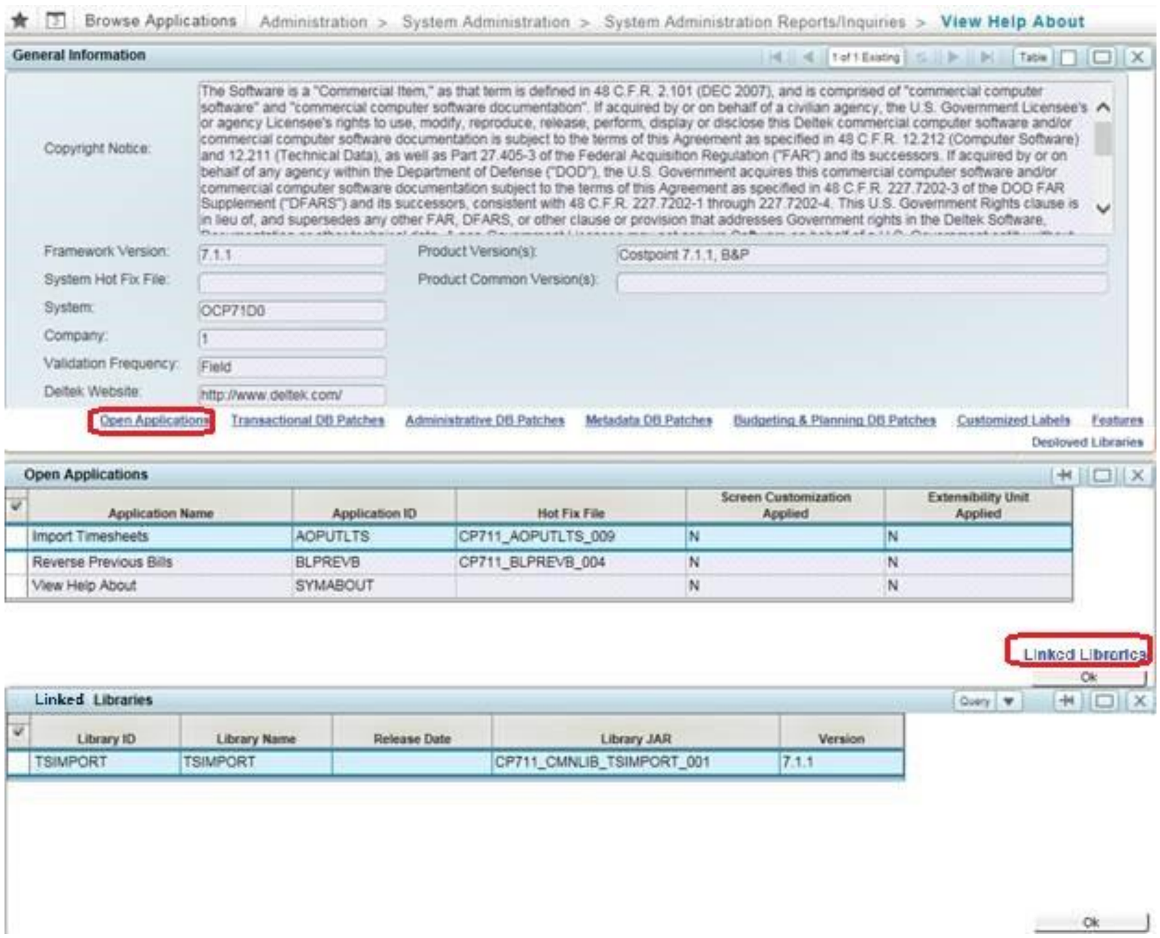
Libraries in View Help About (SYMABOUT)

You can now check the list of deployed libraries in Costpoint 7.1.1. on the View Help About (SYMABOUT) screen. There are two subtasks available when viewing the list of deployed libraries which are:

- **Deployed Libraries** — This subtask displays all deployed libraries in your Costpoint implementation. It also includes another subtask that displays the applications per library.



- **Linked Libraries** — This subtask is found in the Open Applications subtask. The Linked Libraries screen displays the libraries used by a specific application which is currently open or selected.



Application JAR Requirement

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

Domain	Application Name	Application JAR
Administration	View Help About (SYMABOUT)	cp711_symabout_005.zip

In addition, PATCH5070 is required for this update.

Company Codes in Job Codes for Deltek Talent Management

The Costpoint 7.1.1 Deltek Talent Management Integration now adds company codes to job codes when you run the export process for detail job titles. The export process will transfer a job code/company ID combination to Talent Management in the following format: **<Job Code> + '_COMPANY_' + <Costpoint Company ID>**.

This enhancement allows you to perform the following:

- Specify multiple companies that use a specific job code
- Set a default company that will be used when exporting job codes

If you opt not to associate companies to a specific job code, or if you did not specify a default company, exporting detail job titles to Talent Management will create job code/company ID combinations for all existing Configure Labor Settings screen records.

To support the feature, this release includes the following updates to the corresponding Costpoint screens:

Configure Labor Settings (LDMLABOR)

A new **Use this company as the default when exporting Job Codes** check box allows you to indicate if the login company ID is the default company when exporting job codes to Talent Management.

If you do not specify companies in the Talent Management Company ID's subtask on the Manage Detail Job Titles screen, when you select the new check box, only the Login company will be used to create job codes when exporting to Talent Management.

Manage Detail Job Titles (HSMDETL)

A new Talent Management Company ID's subtask allows you to enter the company ID's for companies that use a specific job title code in Talent Management.

If you choose not to add a company ID, and you want to set a default company instead, you can set the Login company as the default on the Configure Labor Settings screen.

Transfer Talent Management Data (EMPHRSDAT)

The application now adds the company ID's to job codes when exporting Detail Job Titles to Talent Management.

Patch Requirements

These enhancements require Costpoint 7.1.1 PATCH3158.

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application JAR
PE	EM	EMPHRSDAT	Transfer Talent Management Data	cp711_emphrsdat_008.zip
PE	HS	HSMDETL	Manage Detail Job Titles	cp711_hsmdetl_001.zip
PE	LD	LDMLABOR	Configure Labor Settings	cp711_ldmlabor_006.zip

Printing of Accounts Payable Checks

When you print a check, the **Starting Check** field now automatically displays the last check number based on the entered cash account and organization.

When you void a check or EFT advice, the **Ending Check** field automatically displays the starting check number. This happens when you press the TAB key from the **Starting Check** field.

Application JAR Requirement

Domain	Application Name	Application JAR
AC	Print/Void Checks (APRCK)	cp711_aprck_009.zip

Rename Input File in Import TE Expenses/Advances

Once an input file has been successfully imported, it will now be renamed to include the import date and .old extension. For example, if the old filename is **xyz.txt**, the new filename after the import process would be **xyz_yyyy-mm-dd.old.txt**.

Application JAR Requirement

Domain	Application Name	Application JAR
AC	Import TE Expenses/Advances (AOPUTLTE)	cp711_aoputlte_013.zip

Patches for Registering Features in View Help About

The following patches have been released to register these features in View Help About (SYMABOUT):

- **PATCH5060** — SubK Phase 2 Enhancements
- **PATCH5061** — Increase the length of the amount fields (currently defined as 14,2)
- **PATCH5062** — Standard Text Improvements for Purchasing
- **PATCH5066** — Allow service centers to compute for projects that do not allow charging/not active

Account Function Code Description in View Project Ledger Activity

The account function code description (**S_ACCT_FUNC_DC**) has been added to the Project Ledger Inquiry table window of the View Project Ledger Activity screen. With this new field, you can determine how an account is being used for the project you are reviewing.

If the account displayed in the Project Ledger Inquiry table window and all its sub-accounts in the same project account group have the same account function code description, **S_ACCT_FUNC_DC** displays that account function code description. If the account and its sub-accounts have different account function code descriptions**, S_ACCT_FUNC_DC** displays Various, and the **S_ACCT_FUNC_DC** field becomes visible on the Detail subtask, where you can view the specific account function code descriptions of the sub-accounts. The new field on the Detail subtask does not display if **S_ACCT_FUNC_DC** on the main screen is not Various. If the account has been removed from the project account group, **S_ACCT_FUNC_DC** displays Missing.

This enhancement requires cp711_pjqprojl_003.zip.

Employee Self Service Sync Integration

Real-time integration is now available for Costpoint and Employee Self Service which allows automatic synchronizing of data between the two systems. This feature is implemented by:

- Inserting new life events into the Life Event (LIFE_EVENT) table when these are created in Costpoint
- Deleting new life events from the Life Event (LIFE_EVENT) table when these are removed in Costpoint
- Inserting new employee life events into the Self Service Tasks (ESS_TASKS) table when these are created in Costpoint
- Deleting new employee life events from the Self Service Tasks (ESS_TASKS) table when these are removed in Costpoint
- Inserting benefit enrollments into the Self Service Tasks (ESS_TASKS) table when an employee has benefit options and enrollment not confirmed
- Deleting expired employee life events from the Self Service Tasks (ESS_TASKS) table when logging into Manage Employee Life Events screen.
- Deleting expired employee benefit enrollments from the Self Service Tasks (ESS_TASKS) table when logging in to the Manage ESS Open Enrollment Elections screen and the Update Benefit Option/Election Tables screen

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

Analyze Full-Time Equivalent Eligibility (HBPFTE)

The application adds a life event on the Self Service Tasks (ESS_TASKS) table when the system automatically creates an employee life event.

Configure ESS Life Events (AOMESSLE)

When you add or delete a life event, the application adds or deletes the life event record on the Configure Self Service Settings screen. The application inserts and deletes records when you save your changes on the screen.

Delete Expired Tasks (ESPSELFSERVUTIL)

- The screen name changed from "Synchronize Life Events" to “Delete Expired Tasks.”
- The following check boxes are no longer available since real-time integration of these items are now included in the processing of other screens:
  - Life Event Master
  - New Life Events
  - Deleted Life Events

    New Benefits Enrollment

Manage Employee Life Events (HBMEQEV)

- When you add or delete an employee life event, the application adds or deletes the life event to Self Service Tasks (ESS_TASKS) table. The application inserts and deletes records when you save your changes on the screen
- When you open the screen, the application removes expired employee life event from Self Service Tasks (ESS_TASKS) table.

Manage ESS Open Enrollment Elections (AOMESSBE)

- When the employee has benefit options and an enrollment that is not confirmed, the application adds benefit enrollments to the Self Service Tasks (ESS_TASKS) table. The application inserts records when you open the application and when you save your changes on the screen.
- When you open the screen, the application removes expired employee benefit enrollments from the Self Service Tasks (ESS_TASKS) table.

Manage Full-Time Equivalent Eligibility (HBMFTE)

The application adds a life event on the Self Service Tasks (ESS_TASKS) table when the system automatically creates an employee life event.

Update Benefit Option/Election Tables (AOPESSDB)

- When the employee has benefit options and an enrollment that is not confirmed, the application adds benefit enrollments to Self Service Tasks (ESS_TASKS) table. The application inserts records when you run the application process.
- When you open the screen, the application removes expired employee benefit enrollments from Self Service Tasks (ESS_TASKS) table.

Patch Requirements

These enhancements require Costpoint 7.1.1 PATCH3129.

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
PE	ES	AOMESSBE	Manage ESS Open Enrollment Elections	cp711_aomessbe_004.zip
PE	ES	AOMESSLE	Configure ESS Life Events	cp711_aomessle_002.zip
PE	ES	AOPESSDB	Update Benefit Option/Election Tables	cp711_aopessdb_007.zip
PE	ES	ESPSELFSERVUTIL	Delete Expired Tasks	cp711_espselfservutil_005.zip
PE	HB	HBMEQEV	Manage Employee Life Events	cp711_hbmeqev_003.zip

Domain	Module	Application ID	Application Name	Application File
PE	HB	HBMFTE	Manage Full-Time Equivalent Eligibility	cp711_hbmfte_006.zip
PE	HB	HBPFTE	Analyze Full-Time Equivalent Eligibility	cp711_hbpfte_012.zip

User Authentication via Active Directory Federation Service (ADFS) or Microsoft Azure

Costpoint Administrators can now configure Costpoint to authenticate users through Active Directory Federation Service (ADFS) server or Active Directory within Microsoft Azure Cloud. ADFS or MS Azure AD effectively perform the same function as local AD for verifying user/password. See Costpoint Security Guide for explanation on use-cases supported and specific setup needed on ADFS/Azure and Costpoint side.

While this feature uses Security Assertion Markup Language (SAML) to communicate with ADFS, this capability is different from SAML SSO. This new feature supports user authentication when a user enters login credentials on a Costpoint login screen, but not when the third-party login screen is used. The latter is not included in this enhancement.

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