Deltek

Deltek Costpoint® 8.2

Release Notes

With Advanced Functionality

March 15, 2024

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Welcome to Costpoint 8.2

Welcome to Costpoint 8.2! This document details all enhancements contained in this release, organized by domain.

Introducing the New Costpoint Release Methodology for On-Premises Customers

Deltek is excited to announce the new Costpoint Release Methodology. The new release methodology will allow the Costpoint team to deliver minor enhancements and new features faster, while ensuring a higher level of quality and stability.

Coinciding with the launch of Costpoint 8.2, Deltek will move to a Continuous Delivery release methodology. Costpoint 8.2 will become Deltek's Innovation Release, delivering minor enhancements and new features on a continuous basis. Costpoint 8.1 will move into Maintenance Support (see Costpoint Product Lifecycle Phases) and will remain in Maintenance Support through the end of 2025 or beyond. As a reminder, in Maintenance Support, Costpoint 8.1 will receive no new enhancements or new features while continuing to receive regulatory updates and critical defect repairs.

By early 2024, it is expected that both Costpoint 8.2 and Costpoint 8.1 will offer "pick and choose" capability. Until then, defect fixes will be provided via MRs. Customers on Costpoint 8.2 will be able to selectively apply new features, enhancements, and defect fixes (per application). Costpoint 8.1 customers can selectively apply defect fixes (per application).

Deltek will continue to provide a monthly Maintenance Release package or MR. MRs have been an easy and preferred method for many customers to keep their Costpoint system up to date.

Helpful Resources

As you work in Costpoint, the following items may prove helpful:

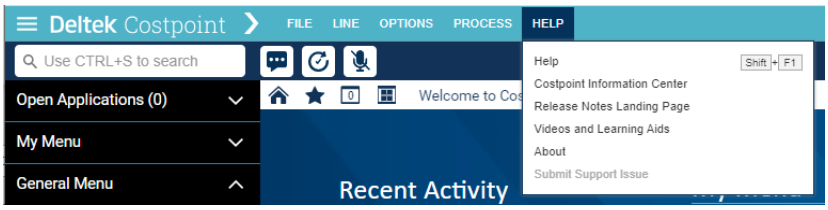
Name	Description	Link
Costpoint Information Center	This stand-alone hub contains all Costpoint documentation for on-premises users.	CIC
Costpoint Cloud Information Center	This stand-alone hub contains all Costpoint documentation for cloud users.	CIC Cloud
Learning Aids Online Help Topic	This online help topic contains links to all Costpoint videos, quick steps, and clickguides.	Learning Aids
Online Help	This is a stand-alone online help system available outside of Costpoint. See more information in the next section.	Help
Costpoint 8.2 Documentation Landing Page	The Documentation Landing Page contains direct links to the online help, CICs, Release Notes Landing Page, Data Dictionary, and the Deltek Support Center.	Documentation Page

Name	Description	Link
Release Notes Landing Page	The Release Notes Landing Page contains direct links to the 8.2 and 8.2.X MR release notes.	Release Notes Page
Installation Guides	For on-premises clients, there are two installation guides available, depending on your environment.	Deltek Costpoint 8.2 New Installation for Microsoft SQL Server Deltek Costpoint 8.2 New Installation for Oracle

Note: Many documents are accessible through more than one location.

Online Help

Help Menu



The Global Help Menu in Costpoint gives you quick access to the following resources.

- **Help**: If an application is open, clicking this option displays the online help for that particular application. If no application is currently open, this option displays the Costpoint Documentation landing page, which offers additional resources such as information on API, Data Dictionary, PDF guides, and more.

- **Costpoint Information Center**: This contains documentation resources for all existing versions of Costpoint. Here, you will find links to videos and learning aids, data dictionary updates, Regulatory updates, developer resources, as well as information on new Costpoint functionality and latest news.
- **Release Notes Landing Page**: This takes you to a page which lists all Costpoint 8.2.x MR release notes presented in HTML format.
- **Videos and Learning Aids**: This launches a page listing all available learning aids for the Costpoint release. These resources include quick steps, clickguides, quick reference cards, and videos that can assist you as you work with Costpoint.
- **About**: This brings up the View Help About screen, which provides information about your Costpoint system.

Local vs. Hosted Help

There are two ways help may be configured in your Costpoint environment—locally or hosted.

Hosted help is accessed through the web, not locally. Users do need Internet access to use the help this way. The benefit of hosted help is that Deltek periodically updates this help. You will always have the most recent version. There is also no need to install help files locally. Regardless of whether you use hosted or local help, the process is the same—when you click **Shift+F1** or **HELP » Help**, the appropriate help topic displays.

To ensure that you always have the most current version of the help, Deltek strongly recommends using hosted help. Otherwise, you will receive help updates only if you download them from the Deltek Software Manager (DSM) as they become available.

Go to the Help tab in the Configuration Utility and select the **Use Hosted Online Help** option to use hosted help. If you installed Costpoint 8.2 as a new client (DeltekCostpoint82ApplicationTier_Buildxx.exe), this was already configured for you.

Note that even if your Costpoint instance uses on-premises help, you can access hosted help with this link:

Hosted Help

Display Issues

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**, clear the **Display intranet sites in Compatibility View** checkbox, and then refresh the browser. Make sure you remove deltek.com (if listed) from the websites you have added to the Compatibility View list.

Local Help with MRs

If you are using help locally, you can run the Maintenance Release (MR) installer. Selecting the **Help Files** feature in the installer will update your local Costpoint help with the latest changes. You can download the installer from DSM.

Costpoint Business Intelligence 8.2 Documentation

The documentation for Costpoint Business Intelligence 8.2, formerly known as Costpoint Enterprise Reporting, is available in Deltek Software Manager (DSM) and is part of Costpoint 8.2.

General

This section describes Costpoint 8.2 enhancements that apply to the whole product as well as new functionalities affecting several domains and screens.

In-App Guidance

Deltek has partnered with Gainsight, a top customer success platform, to provide in-app guidance with Costpoint 8.2. In-app Guidance allows us to conveniently introduce users to new features that would help them complete their tasks more efficiently. These in-app guidance provide quick tips, videos, and links to additional learning materials.

To personalize the experience, we collect generic application usage statistics but never personal information. For instance, we may collect the name of the application and how a user launched it, but the personal information about the user is never collected. The Costpoint Administrator can disable this feature with the **Do not capture application usage statistics** setting in the Configure System Settings application.

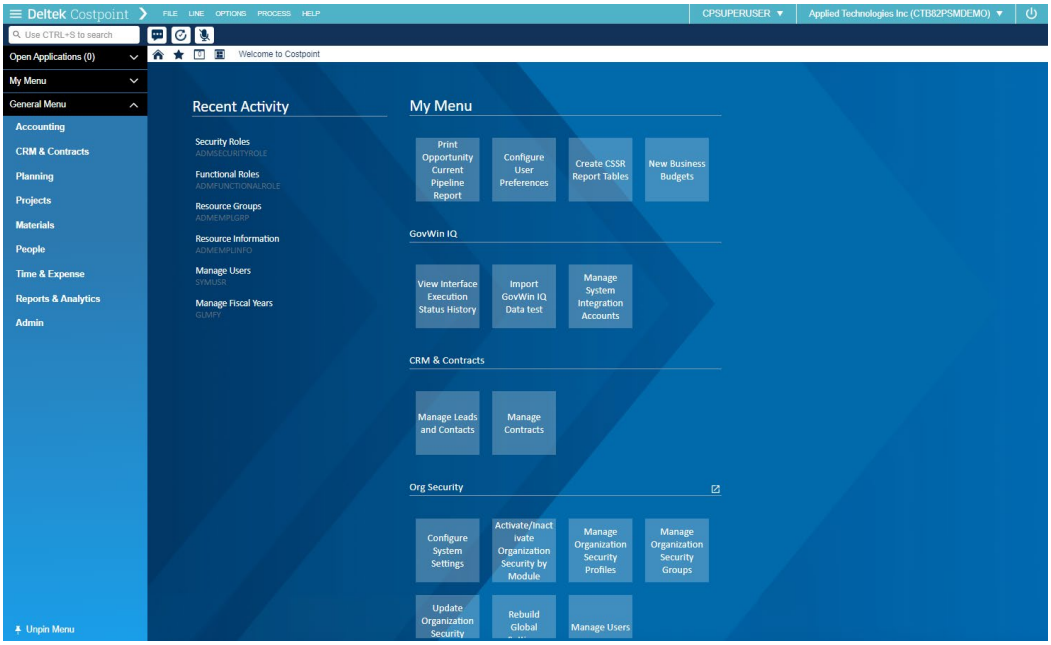
Enable In-App Guidance

The **Enable In-App Guidance** setting allows administrators to enable or disable in-app guidance in Costpoint. This setting is available in Configure System Settings on the new In-App Guidance tab in Corporate Settings.

Welcome Screen

When you log in, you will see the new Welcome Screen. The Welcome screen shows your recently opened applications and My Menu application shortcuts, providing simple navigation to applications upon login. The Welcome Screen does not display when you log in to a specific default application.

Click **Show Welcome Screen** on the Global Toolbar to minimize an open application and display the Welcome Screen. Click this icon again to return to your open application.

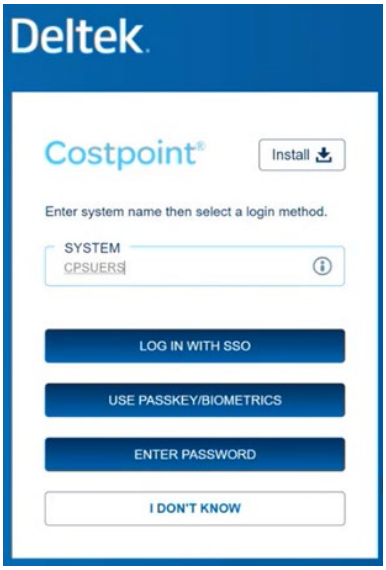


Login Options for First-Time Users

For first-time users logging into Costpoint, you will be prompted to enter the system name and choose from the following login methods:

- **Log in with SSO**: Select this method to use your single sign-on credentials.
- **Use Passkey/Biometrics**: Select this method to use a biometric credential, such as your fingerprint or facial recognition, with a registered device.
- **Enter Password**: Select this method to enter a username and password.

Based on your selection, you will be directed to the appropriate login screen configuration. It is also possible to specify the login method in the URL.



Costpoint Navigation Menu

New Navigation Menu

The new Left Navigation menu provides a collapsible menu with the following sections:

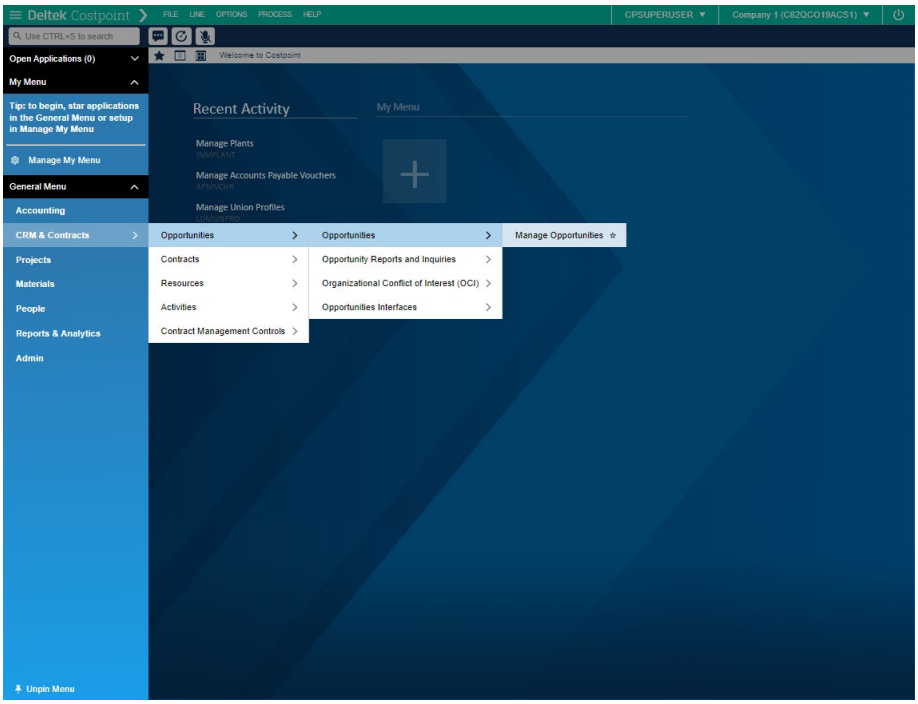
- **Open Applications**: This section lists your open applications.
- **My Menu**: This section lists your application shortcuts and includes the **Manage My Menu** option to configure your menu.
- **General Menu**: This section includes all Costpoint applications that you can access, grouped by domain. When you click a domain, the related application groups expand horizontally, as in previous Costpoint versions. At the application level of the menu, you can select or clear the star next to an application name to add it or remove it from My Menu.

Use the **Collapse/Hide Menu** icon on the Global Toolbar to expand or collapse the Navigation menu.

The Menu is pinned on the left side of the screen by default. You can click **Unpin Menu** so that the menu will open only when you click the Application Breadcrumbs or the **Collapse/Hide Menu** icon. The unpinned menu will hover over the open applications or Welcome Screen rather than opening on the left.

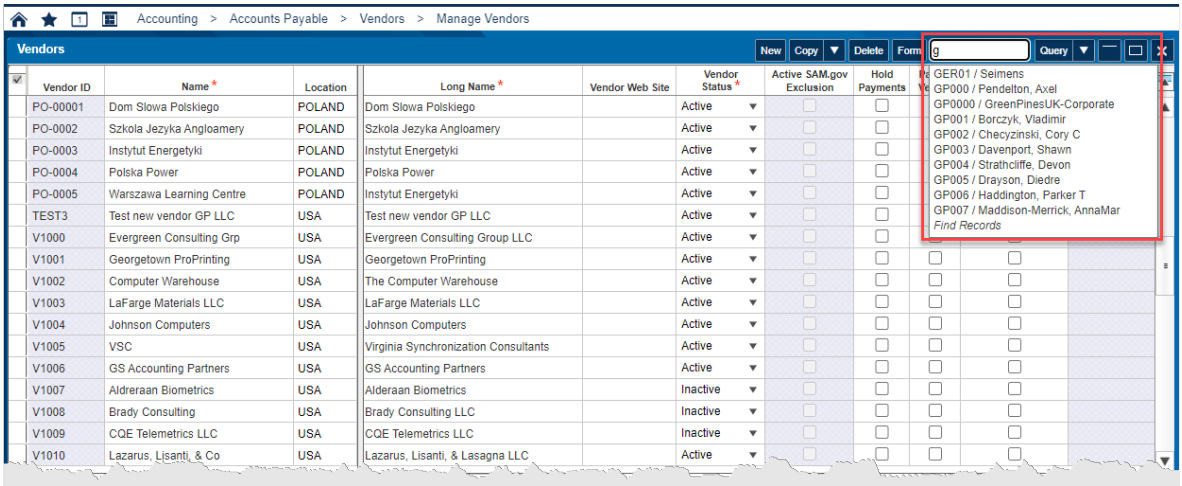
If the Menu is collapsed and no applications are open, you can also click **Welcome to Costpoint** in the breadcrumb area to open the Menu.

The **Search** field, previously called Browse Applications, now resides on the Application Toolbar. Search results initially show 10 applications. If your search returns more than 10 applications, you can click the **Show next** link at the bottom of the results list to see more applications. This feature also includes a new Search hotkey (CTRL + S).



Quick Find for Application Screens and Subtasks

Speed up productivity with the new **Find** field on the Application Toolbar and subtasks. Use Find to quickly filter records without opening the Query dialog box. This feature uses the same “Begins with” logic as the Find feature in the Query dialog box. Prepopulated suggestions for the most commonly used fields will instantly update as you enter text, and the results on the application screen will display with a single click. This feature is available in Auto-Positioning mode only.



Interactive Emails

Costpoint now sends interactive emails in an adaptive card format that allow you to enter time and approve or deny a workflow step right from your MS Outlook email. You can also view the current workflow status, approve, reject, or escalate a workflow step, leave a comment, and choose available options directly from MS Outlook without logging in to Costpoint. The next time you open the same email, you will see the current workflow step and status.

The new Interactive Email tab in Configure System Settings includes settings to enable interactive email notifications for Time & Expense, the approval workflow, and the requisition approval workflow.

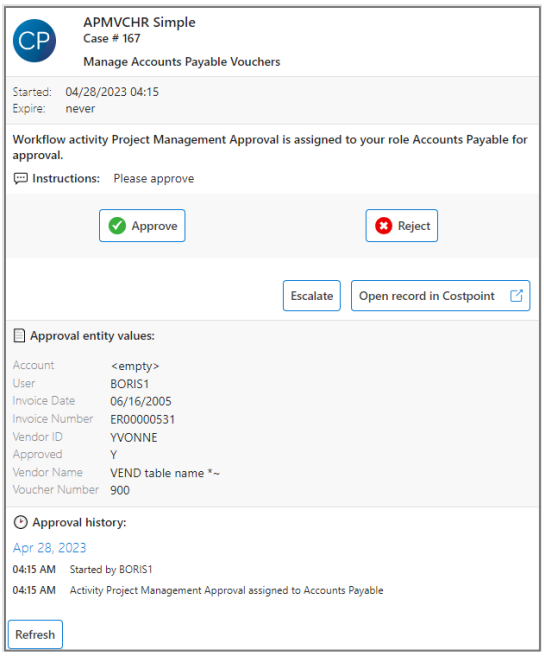
For the standard requisition approval workflow, you can now view the information related to the purchase requisition and approve the purchase requisition via email. To enable this functionality, select the **Enable Requisition Approval Interactive Email** checkbox on the Configure System Settings screen.

The information displayed on the purchase requisition email is based on the case labels you selected on the Manage Workflow Case Labels screen.

Select the **Enable Workflow Interactive Email** checkbox to enable interactive email notifications for the approval workflow (NEW).

Select the **Enable Time & Expense Interactive Email** checkbox to enable interactive email notifications for Time & Expense.

Attention: To receive interactive emails, the email address in the Manage Users (SYMUSR) application must match the primary email address in MS Outlook. If the addresses do not match, Costpoint will default to the “plain” email format.



Attention: In addition to the steps described above, you must also complete steps described in Appendix H of the Costpoint 8.2 Configuration Utility.

Intracompany Work Assignments

Costpoint 8.2 gives you the ability to set up and manage intracompany work assignments (IWAs). With IWA, companies on the same database and using the same co-deployed Time & Expense instance can efficiently move charges and expenses from the performing company (intracompany vendor) to the contracting company.

This feature allows employees from the performing company to charge the IWA on their timesheet and expenses and enables the vendor to specify the receivable and/or revenue account/project/organization where funding should be posted.

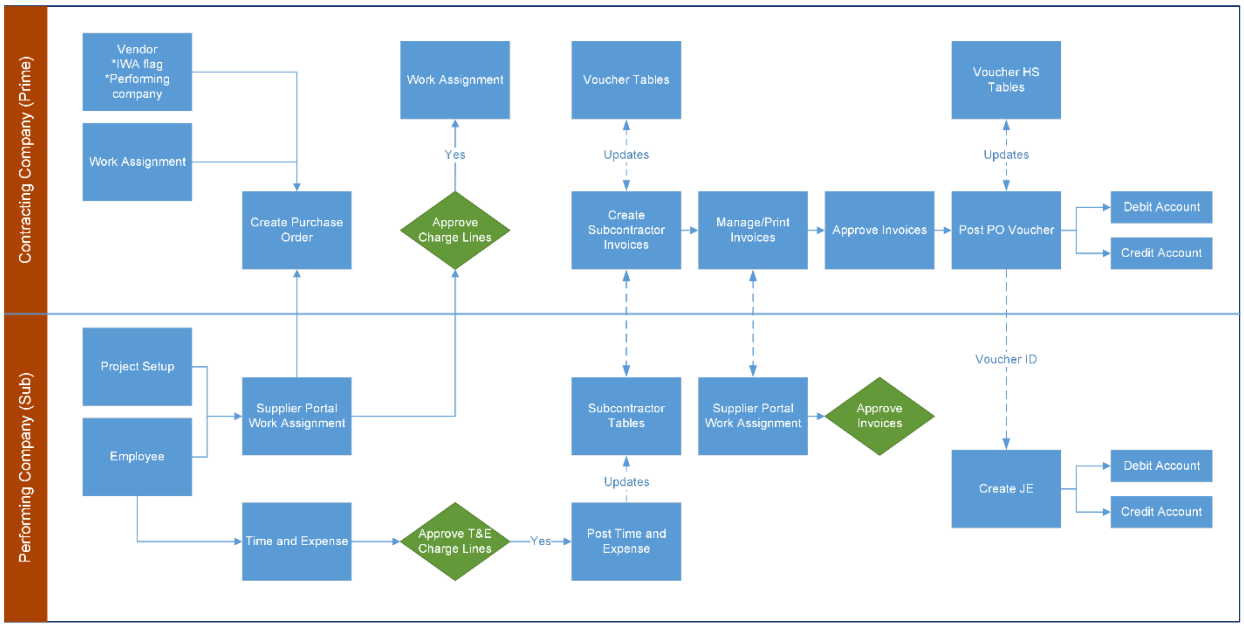
This enhancement also creates invoices, vouchers, journal entries (JEs), and billing history, alleviating the need to set up inter-company work order (IWO) projects and mapping, which could be time-consuming and where the bulk of the work structure is done in the performing company. With IWA, the contracting company will be responsible for setting up the work assignments with the appropriate charging numbers. Through the Supplier Portal in the Materials domain, the performing company will be able to update the charges applicable to the work subcontracted to them and select those employees who can charge against the work assignment.

In a nutshell, the following process steps and diagram describe the IWA workflow.

Step	Contracting or Performing Company	Application	Process
1	Contracting Company	Manage Vendors (APMVEND)	Create an intracompany vendor record that is linked to a particular performing company. The performing company's employees are also set up as vendor contacts. This vendor will be used when you create an IWA purchase order (PO) with a **Subcontractor Agreement** PO type and a two-way A/P match type.
2	Contracting and Performing Companies	Manage Employee Information (LDMEINFO) Manage User Groups (SYMGRP) Manage Users (SYMUSR)	Set up employee users in both the contracting and performing companies. In the contracting company, the performing company's employees should be given access to the Supplier Portal module and the necessary applications.
3	Contracting Company	Manage Purchase Orders (POMMAIN)	Create a **Subcontractor Agreement** purchase order for the work or services needed from the performing company.

Step	Contracting or Performing Company	Application	Process
4	Contracting Company	Manage Work Assignments (SMMWRK)	Create a work assignment with applicable charge lines and projects/accounts/organizations linked to the subcontractor PO and then release the work assignment to the performing company for review and updates. The performing company will have access only to approved work assignments.
5	Performing Company	Manage Work Assignments (SPMSIWA)	Assign employees to the work assignment, review/update necessary work assignment details, and mark the work assignment for submission through the Supplier Portal.
6	Performing Company	Timesheet (TMMTIMESHEET) Expense Report (EPMEXPRPT)	Employees begin work and charge time and expenses against the work assignment through Time & Expense.
7	Performing Company	Manage/Approve Timesheets (TMMTIMESHEET_APPROVE)	Approve employee timesheets. Information is posted to both the contracting company's subcontractor tables and the performing company's expenses.
8	Contracting Company	Create Subcontractor Invoices (SMPINVC) Manage Subcontractor Invoices (SMMMINVC) Print Subcontractor Invoices (SMRINVC)	Create, manage, and print the subcontractor invoice.

Step	Contracting or Performing Company	Application	Process
9	Contracting Company	Approve Subcontractor Invoices (SMMAINVC) Post Vouchers (APPPOSTV) Post Journal Entries (GLPJE)	Approve the subcontractor invoice. A PO voucher is created in the contracting company, while an IWA JE is created in the performing company when the subcontractor invoice is approved on the Approve Subcontractor Invoices screen. The PO voucher is posted to the intracompany payable account in the contracting company, while the JE is posted to the intracompany receivable and revenue accounts in the performing company.
10	Contracting and Performing Companies		Once payment is made (through elimination of JE, manual check/offsetting receipt, or any other method defined in your business model), the purchase order is considered system-closed.



Attention: For more details on these steps, see the following topic in the online help: Intracompany Work Assignments. This topic also includes scenarios and steps when you need to delete or reverse IWA PO vouchers.

As you set up your IWAs, take note of the following rules:

- The contracting and performing companies must be in the same Costpoint database.
- Both companies will be able to access the same work assignment.
- Multiple performing companies can be set up as intracompany vendors in one contracting company as long as they are in the same Costpoint database as the contracting company and assigned to separate work assignments.
- Employees can be set up to work across companies.
- Multiple employees with different projects, PLCs, and other details can charge the same contracting company.

Several applications in different domains across Costpoint have been updated for this enhancement. For detailed information on these changes, refer to the following sections of this document:

- Intracompany Work Assignment Enhancements in Accounting
- Intracompany Work Assignment Enhancements in Subcontractor Management
- Intracompany Work Assignment Enhancements in Procurement
- Intracompany Work Assignment Enhancements in Time & Expense

Preconfigured Approval Workflows (New)

Costpoint provides four preconfigured approval workflows to use in the Accounting and Projects domains. The following preconfigured approval workflows (New) are installed with Costpoint 8.2 or available for download if you upgraded to Costpoint 8.2.

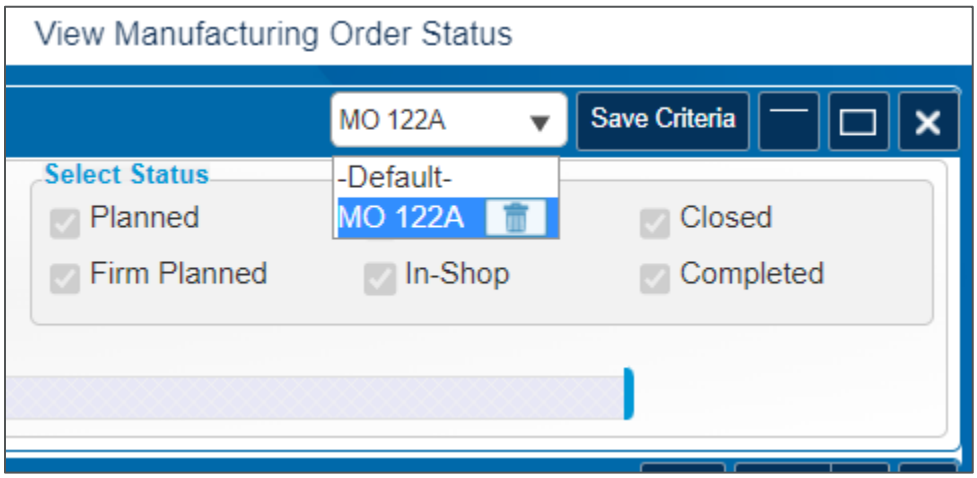
- Approve AP Voucher
- Approve Journal Entry
- Approve PO Voucher
- Approve Standard Bill

Refer to KB Article #112942 on the Deltek Customer Care Connect site for instructions on finalizing the setup of these workflows and uploading the workflows if they need to be installed.

Save Criteria

The Save Criteria feature is available in some applications with Execute functionality. Click **Save Criteria** on the Application Toolbar to store your filtered result set criteria for an application. When you open an application that has saved filter criteria, Costpoint will execute the last used criteria automatically. The saved criteria are available to select and delete from a list on the Application Toolbar.

You cannot modify saved criteria. However, you can create and save new criteria that reflect your changes and remove the previously saved version.


View Manufacturing Order Status
MO 122A
Save Criteria
-Default-
MO 122A
Select Status
Planned
Closed
Firm Planned
In-Shop
Completed

Accounting

This section describes Costpoint 8.2 enhancements for the Accounting domain.

Adjust Currency Balances Screen Enhancements

The Identification section, which contains the **Parameter ID** and **Description** fields, was added to the Adjust Currency Balances screen to enable you to create a new parameter ID or to retrieve a previously saved parameter ID, which serves as a template for screen selection parameters.

The **Execute** button has been disabled for this screen, and Costpoint now automatically populates the Bank Transactions table window when you query a **Parameter ID** or when you select the **Fiscal Year**. Click the new **Refresh** button to update the contents of the Bank Transactions table window when you change the values in the **Selection Ranges** group box.

When you query a parameter ID, select a record in the table window, and open the Adjust/Revalue subtask, Costpoint automatically populates the **Period** and **Subperiod** fields on the Adjust/Revalue subtask depending on the selection criteria you entered on the main screen, and the **Cash Account** fields using the **Cash Account**, **Cash Organization**, **REF_1**, and **REF_2** fields of the transaction record you selected.

When you click in the **Revaluation Account** fields on the Adjust/Revalue subtask, the Lookup displays the **Non-Project Accounts**, **Organizations**, **REF_1**, and **REF_2** field values entered on the Manage Multicurrency Accounts screen for the currency entered in the **Selection Criteria** group box.

Intracompany Work Assignment Enhancements in Accounting

The following applications have been updated to allow you to set up and manage intracompany vendors as well as create, manage, or view intracompany work assignment journal entries or vouchers.

The updates also allow you to process and post sales and/or value added tax from intracompany work assignments and include IWA transactions when you update tax report tables and generate tax reports.

Manage Vendors Screen Enhancements

Use the new **Intracompany Vendor** checkbox on the Header tab to indicate if the vendor is an intracompany vendor. If you selected the **Intracompany Vendor** checkbox, enter, or click to select, the company that will handle intracompany work assignments in the **Performing Company** field.

These new fields are hidden if you are not licensed for Subcontractor Management.

Import Vendors Screen Enhancements

Use the new IC_VEND_FL and PERF_COMPANY_ID columns in the vendor input file to indicate if the vendor is an intracompany vendor and to enter the ID of the performing company for that vendor when importing vendors.

If you set the IC_VEND_FL to Y, you must enter a value in the PERF_COMPANY_ID column, and the performing company ID must not be the same as the company that is currently logged on to Costpoint.

After you import a vendor, the values you set in these new columns will reflect in the **Intracompany Vendor** and **Performing Company** fields on the Manage Vendors screen.

If you are not licensed for Subcontractor Management, the value you enter in these columns will be disregarded during the import process.

New Journal Entry Code

The **IWA** journal entry code for intracompany work assignments is now available in Costpoint. If you are licensed for Subcontractor Management, this enables you to manage, approve, post, and print reports on IWA journal entries on the following Accounting screens:

- Configure General Ledger Settings
- Manage System Assigned JE Number
- Manage Accounting Periods
- Manage Subperiods
- Manage Journal Entries
- Approve Journal Entries
- Post Journal Entries
- Print Journal Entry Edit Report
- Print Pending Journal Entries Report
- Print Approved Journal Entries Report
- Print Journal Entry Posting Summary Report
- Purge Journal Entry History

Manage Journal Entries Screen Enhancements

When you select the **Intracompany Work Assignment** journal type, you can now view IWA journal entries that were created after the approval of subcontractor invoices for that IWA.

An IWA journal entry is created for both the contracting company and the performing company to enable both companies to post their IWA transactions to their respective general ledgers.

If the **Approval Required** checkbox is selected for **IWA** on the Configure General Ledger Settings screen, the **Approved** checkbox defaults to cleared, and the IWA journal entry must be approved on the Approve Journal Entries screen. Otherwise, if the **Approval Required** checkbox is cleared for **IWA**, the **Approved** checkbox defaults to selected.

Non-balancing entries are not allowed for IWA, and you cannot manually enter, modify, or delete an IWA journal entry.

Post Journal Entries Screen Enhancements

To support intracompany work assignments, new columns were added to the SUBC_PROJ_BILL_HS table. The SUBC_PROJ_BILL_HS table is first updated once an invoice is approved on the Approve Subcontractor Invoices screen. And when the performing company posts IWA journal entries, Costpoint updates the new columns in the SUBC_PROJ_BILL_HS table:

- LVL1_KEY: This is a unique key that identifies the records that are linked between the SUBC_PROJ_BILL_HS and tax report tables.
- JE_HDR_KEY: This is the journal entry header key assigned to the performing company's IWA journal entry. This identifies which record in the SUBC_PROJ_BILL_HS table is linked to the JE_HDR and JE_HDR_HS tables.

- PERF_JE_POSTED_FL: This indicates if the IWA journal entry is posted and defaults to N after the invoice is approved on the Approve Subcontractor Invoices screen. When the performing company posts an IWA journal entry, this column is set to Y. However, if the posted IWA journal entry is a reversing JE, this column is set to N.

You can post IWA entries only to an **Open** period or subperiod. If you post an IWA entry to a **Not Available** or **Closed** period, an error occurs.

Post Vouchers Screen Enhancements

When the contracting company posts an IWA voucher, Costpoint updates the following new columns in the SUBC_PROJ_BILL_HS table:

- LVL1_KEY: This is a unique key that identifies the records that are linked between the SUBC_PROJ_BILL_HS and tax report tables.
- VCHR_HDR_KEY: This is the voucher header key assigned to the contracting company's voucher. This identifies which record in the SUBC_PROJ_BILL_HS table is linked to the VCHR_HDR and VCHR_HDR_HS tables.
- VCHR_POSTED_FL: This indicates if the voucher is posted and defaults to N after the invoice is approved on the Approve Subcontractor Invoices screen. When the contracting company posts an IWA voucher, this column is set to Y.

Reverse Posted Vouchers Screen Enhancement

When you reverse previously posted IWA vouchers, Costpoint inserts a new line that contains negative values of the voucher being reversed in the SUBC_PROJ_BILL_HS table instead of updating the original voucher line.

Close Periods Screen Enhancement

For the performing company, all IWA transactions must already be posted before you close a period. If you have any unposted IWA transaction for the period you are closing, a message displays and the period will not close.

Update Tax Report Tables Screen Enhancement

The **IWA** checkbox was added to the **Bill Type** group box to provide you an option to include sales and/or value added tax for intracompany work assignments when updating tax report tables.

If you select the **IWA** checkbox and no records are processed, ensure that the contracting company's PO voucher and the performing company's IWA JE are both posted.

View Tax Reporting Status by Tax Account Screen Enhancement

The **Type** drop-down list in the **Output** group box now has the **IWA** option. If you set the **Type** to **IWA**, your company's IWA billing transactions will display on the table window.

View Tax Reporting Status by Transaction Screen Enhancement

The **Type** drop-down list in the **Output** group box now has the **IWA** option. If you set the **Type** to **IWA**, your company's IWA billing transactions will display on the table window.

Print Sales/Value Added Tax Report Screen Enhancements

This screen was updated to include sales and/or value added tax for intracompany work assignments in the following lines of the Value Added Tax Return report:

- **Line 1**: VAT due in this period on sales and other outputs
- **Line 4**: VAT reclaimed in this period on purchases and other inputs (including acquisitions from the EC)
- **Line 6**: Total value of sales and all other outputs, excluding any VAT
- **Line 8**: Total value of all supplies of goods and related services, excluding any VAT to other EC Member States

Print Intra European Community Trade Statistics Report Screen Enhancement

When you print an Intra EU Trade Statistics report, IWA transactions that have the appropriate **Commodity Code**, **EC Country Origin Code**, and **Value Amount** will be included in the report.

Multi-User Report Printing

The Post Cash Disbursements screen now allows multiple users to print or preview the Cash Disbursements Report at the same time. Similarly, multiple users can simultaneously print or preview the Cash Receipts Journal on the Post Cash Receipts screen.

The posting process on both screens remains a single-user functionality; however, the posting can be submitted by multiple users simultaneously. Costpoint will queue the posting/commitment transactions and process them one at a time.

You have only the **Print/Post Cash Disbursements** and **Print/Post Cash Receipts** options as the **Post Cash Disbursements** and **Post Cash Receipts** options are no longer available. The reports generated from the Print/Post process will contain a unique sequencing number and should be retained if needed for historical purposes.

For related features in other domains, see the following sections:

- Multi-User Reports in Projects
- Single-to-Multi User Reports in Materials

Cash Receipts Enhancements

Several user interface and functionality modifications were applied to multiple Costpoint Accounting screens to provide you a more ergonomic interface that facilitates ease of use and streamlined operability when processing cash receipts.

New Check Format

The **Check** field, which currently supports only up to nine numbers, was updated to support up to 40 alphanumeric characters.

This update applies to the following screens:

- Manage Cash Receipts
- Copy/Reverse Cash Receipts

- Post Cash Receipts
- View Receivables and Collections
- Print Accounts Receivable History Report
- Print Cash Receipts Edit Report
- Manage Accounts Receivable History

Manage Cash Receipts Screen Enhancements

Various updates were applied to the Manage Cash Receipts screen to provide an improved and more efficient process when you manage your cash receipts.

Main Screen Updates

User interface updates to the main screen include a new layout and new fields:

The **Functional Currency Total** and **Receipt Currency Total** fields under the **Debit** and **Credit** columns are now replaced by the **Functional** and **Transaction** fields in the new **Receipt Total**, **Line Total**, and **Unidentified** columns.

Field	Column	Description
Functional	**Line Total**	This field displays the total of the **Func Amt Recvd** column in the Cash Receipt Detail table window in your company's functional currency.
Transaction	**Receipt Total**	For new cash receipts, use this field to enter the total cash receipt amount for the current transaction. For existing cash receipts, Costpoint automatically populates this field.
Transaction	**Line Total**	This field displays the total of the **Amt Recvd** column in the Cash Receipt Detail table window. Click the **Recalculate** button to update this field.
Transaction	**Unidentified**	This field displays the difference between the **Transaction (Receipt Total)** and **Transaction (Line Total)** amounts. You cannot save the cash receipt if the unidentified amount is not zero. Click the **Recalculate** button to update this field.

Cash Receipts Detail Table Window Updates

The Cash Receipt Detail table window was also revamped with a new layout, modified fields, and new functionalities:

- The Charge Distribution, Miscellaneous, and Functional Amounts tabs were removed, and the fields in these tabs are now moved to the main table window.
- The new **Notes** field was added to the table window. Use this field to enter an optional message, comment, or notation for a cash receipt line. You can enter up to 250 characters.

- The **Customer Account** field is now replaced by the **Customer** field. Instead of selecting a customer account, you now select a Customer ID in the Lookup of this field.
- The **Invoice** field now has a Lookup functionality. The Lookup displays the invoice number, customer account, customer name, invoice amount, balance due, due date, and project.

  When you select an **Invoice**, Costpoint automatically populates these fields in the table window: **Invoice Amount**, **Balance Due**, **Customer**, **Customer Name**, **Org Abbrev**, **Proj Abbrev**, **Proj Acct Abbrev**, **Account**, **Organization**, **Project**, **REF 1**, and **REF 2**.

  If you entered or selected a **Customer**, the Lookup displays invoices for that customer only.

New Cash Receipt Lines Input Method

Costpoint version 8.2 provides a simpler method of entering cash receipt lines.

In lower Costpoint versions, you must always enter cash receipt details in pairs: one line with a negative **Amt Recvd** that is applied to the A/R account in the invoice, and another with a positive amount that is applied to the Cash Account. Both lines display on the Cash Receipt Detail table window.

Now, you have to enter only lines with a positive **Amt Recvd** for the Cash Account, and Costpoint automatically creates the negative entries for the A/R account. The negative entry does not display on the table window but is reflected in the back end as well as in the Quick Cash Receipts Edit report.

The total of the **Amt Recvd** field in all the lines you entered displays in the **Transaction (Line Total)** field. This must be equal to the amount you entered in the **Transaction (Receipt Total)** field. If the amounts are unequal, the difference displays in the **Transaction (Unidentified)** field. To save the transaction, the unidentified amount must be zero.

When you enter information on the Transfers subtask, both the negative and positive lines still display on the Cash Receipt Detail table window. Transfer lines do not affect the values of the **Transaction** fields on the main screen.

Copy/Paste from Excel

You can now copy and paste values from Microsoft Excel when entering cash receipts using Table View. This works for both the main screen and for the Cash Receipt Details table window.

Quick Cash Receipts Edit Report

This new feature allows you to preview or print a report on the cash receipt that is currently displayed on the screen.

The Quick Cash Receipts Edit report provides the general cash receipt information and a detailed view of the cash receipt lines, sorted by Cash Account, alphabetically.

This is an example of the Quick Cash Receipts Edit report:

Quick Cash Receipts Edit Report - 1

logo

DELTEK, INC. - 1?23"4!5'6;7:8>9<0-
Quick Cash Receipts Edit Report

Page 1 of 1
05/18/23
06:20 AM

Date: 04/13/23
Entry User: TABARINAM
Cash Receipt Number: 1
Deposit Number:
Currency: USD

	Cash Account	Customer/Name	Project	Invoice	AR Account	Organization	Check	Transaction		Functional		Notes
Cash Account: CC Txfr 1 USD												
	CC100-100/C.3							(USD)	1,000.00	(USD)	1,000.00	
Invoices												
		MTCUST/Patrick Dempsey	MTC1.001	INV-0000004570	01100-011	1		(USD)	(1,000.00)	(USD)	(1,000.00)	
							Subtotal by Cash Account: CC100-100/C.3	**(USD)**	**0.00**	**(USD)**	**0.00**	
Cash Account: Cash Receipts Cash Account												
	01000-020/1.2							(USD)	10.00	(USD)	10.00	
Invoices												
		MTCUST/Patrick Dempsey	MTC1.001	INV-0000004570	01100-011	1		(USD)	(10.00)	(USD)	(10.00)	
							Subtotal by Cash Account: 01000-020/1.2	**(USD)**	**0.00**	**(USD)**	**0.00**	
Cash Account: Default AR Cash												
	00111-010/1.C							(USD)	990.00	(USD)	990.00	
Invoices												
		GENSYS/General Systems Inc.	CB04.001	0INVC-CB22-01	01100-011	1.1.100		(USD)	(990.00)	(USD)	(990.00)	
							Subtotal by Cash Account: 00111-010/1.C	**(USD)**	**0.00**	**(USD)**	**0.00**	
							Total Debit Amount by Currency: **(USD)**		**2,000.00**	**(USD)**	**2,000.00**	

Post Cash Receipts Screen Enhancement

The Post Cash Receipts screen was updated to include the values you entered in the **Notes** field of a cash receipt line on the Manage Cash Receipts screen when you post cash receipts.

Import Cash Receipts Screen Enhancements

When you import cash receipts using EDI 823, you can now enter a check ID with a length of up to forty alphanumeric characters in the input file.

A new option in the **Receipt** group box, **Use Cash Receipt Number From Input File**, allows you to manually enter a user-defined cash receipt number in the input file, which will be reflected in Costpoint after you import cash receipts.

Furthermore, you can now import cash receipts using a CSV input file. With a CSV file, you can import invoice lines, transfer lines, and miscellaneous lines. It follows this format:

Cash Receipt Header

Column	Costpoint Field	Type	Length	Required or Optional	Format/Notes
Line Type	N/A	Character	1	Required	**H** for header
Receipt Date	RECPT_DT	Date	10	Required	MM/DD/YYYY
Receipt ID	CASH_RECPT_NO	Number	10	Optional	Can be system-generated

Column	Costpoint Field	Type	Length	Required or Optional	Format/Notes
Bank Deposit No.	BANK_DEPOSIT_NO	Alphanumeric	15	Optional	
Fiscal Year	FY_CD	Alphanumeric	6	Optional	If null, value from screen is applied.
Period	PD_NO	Number	5	Optional	If null, value from screen is applied.
Subperiod	SUB_PD_NO	Number	5	Optional	If null, value from screen is applied.
Pay Currency Code	PAY_CRNCY_CD	Alphanumeric	3	Optional	Enter value if Multicurrency is activated.
Rate Group ID	RATE_GRP_ID	Alphanumeric	6	Optional	Enter value if Multicurrency is activated.
Currency Date	PAY_CRNCY_DT	Date	10	Optional	Enter value if Multicurrency is activated.

Cash Receipt Lines

Column	Costpoint Field	Type	Length	Required or Optional	Format/ Notes
Line Type	N/A	Character	1	Required	**L** for line
Line Source Code	S_LINE_SOURCE_CD	Character	1	Required	**I** for invoice **M** for miscellaneous **T** for transfer
Receipt ID	CASH_RECPT_NO	Number	10	Required	
Line No.	LN_NO	Number	5	Required	
Invoice ID	INVC_ID	Alphanumeric	15	Optional	If null, UNK invoice is created.
Customer ID	CUST_ID	Alphanumeric	12	Required	

Column	Costpoint Field	Type	Length	Required or Optional	Format/ Notes
Check ID	CR_CHECK_ID	Alphanumeric	40	Optional	
Transaction Amount	TRN_AMT	Decimal	17, 2	Required	
Transaction Description	TRN_DESC	Alphanumeric	30	Required	
Discount Taken Amount	DISC_TAKEN_AMT	Decimal	17, 2	Required	
Cash Account Description	CASH_ACCT_KEY	Alphanumeric	30	Required	If null, default is provided.
Bank Abbreviation	BANK_ACCT_ABBRV	Alphanumeric	6	Optional	
Account ID	ACCT_ID	Alphanumeric	15	Required	
Org ID	ORG_ID	Alphanumeric	20	Required	
Project ID	PROJ_ID	Alphanumeric	30	Optional	
Reference 1	REF1_ID	Alphanumeric	20	Optional	
Reference 2	REF2_ID	Alphanumeric	20	Optional	
Project Account Abbreviation	PROJ_ACCT_ABBRV_CD	Alphanumeric	6	Optional	
Finance Charge	FINCHG_RCV_AMT	Decimal	17, 2	Optional	
Expense Report ID	EXP_RPT_ID	Alphanumeric	12	Optional	
Bank Account Amount	BANK_AMT	Decimal	17, 2	Optional	
Line Notes	NOTES	Alphanumeric	250	Optional	

Example

This image is an example of a CSV file that you can use to import cash receipts:

```
H,02/03/2022,1001,MTTEST-10,2022,1,1,USD,DAILY,02/28/2022,
L,I,1001,1,INV-0000005942,ARMY,1ST-CHECK,30.63,Cust AR Line,3.06,Default AR Cash,,,,,,,,,,11.12,This is a note
L,I,1001,2,INV-0000005942,ARMY,2ND_CHECK,,Customer Finance Charge Acct,,Default AR Cash,,,,,,,,7.12,,,This is a note
H,02/03/2022,1002,MTTEST-11,2022,1,1,USD,DAILY,02/28/2022,
L,I,1002,1,INV-0000005953,BROOKE,1ST-CHECK,112.33,Cust AR Line,3.05,,,,,,,,,,,,22.2,This is a note
L,I,1002,2,INV-0000005953,BROOKE,2ND_CHECK,,Customer Finance Charge Acct,,,,,,,,,,10.23,,,This is a note
```

To upload a CSV file, select **CSV** in the **File Format** drop-down list. Selecting **CSV** disables the following fields:

- **Transaction Set** drop-down list
- **File Contains Hard Returns** checkbox
- **Receipt Date** field
- **Cash Account** field
- **EDI Delimiters** group box fields
- **Extended Matching** group box fields

View Receivables and Collections Screen Enhancement

The new **Notes** field is also now available on the Cash Receipt Detail subtask of the Invoice Detail subtask on the View Receivables and Collections screen.

This field displays the values you entered in the **Notes** field of a cash receipt line on the Manage Cash Receipts screen.

Create Revaluation Entry Screen Enhancements

The Account Non-Contiguous Ranges subtask was added to the Create Revaluation Entry screen to allow you to enter a non-contiguous range of accounts that you want to revalue. With this subtask, you can create a non-contiguous range that consists of multiple contiguous ranges of accounts, a single account, or a combination of both.

You can use this subtask only if you select the new **Non-Contiguous Ranges** checkbox that was added to the **Account** group box.

Intelligent Character Recognition for Voucher Creation

The Manage Accounts Payable Vouchers screen was integrated with an Intelligent Character Recognition (ICR) tool that allows you to create new vouchers by uploading electronic copies of invoices.

Once you upload an invoice, the ICR scans the contents of the file and automatically populates corresponding fields in Costpoint.

The Linked Content Files and Manage Application/Content Links screens were also updated to support this enhancement.

> **Note:** To use the ICR tool, the Linked Content Files and Manage Application/Content Links screens must be properly configured.
>
> Refer to the Manage Application/Content Links (SYMCMIAL) Application Updates topic in the Admin section for more information.

Manage Accounts Payable Vouchers Screen Enhancements

You can now use the new **Attach** button on the application toolbar to upload and scan an electronic copy of an invoice and automatically enter the invoice details in the mapped fields to create a new voucher for that invoice.

When you scan an uploaded invoice, Costpoint populates the following fields:

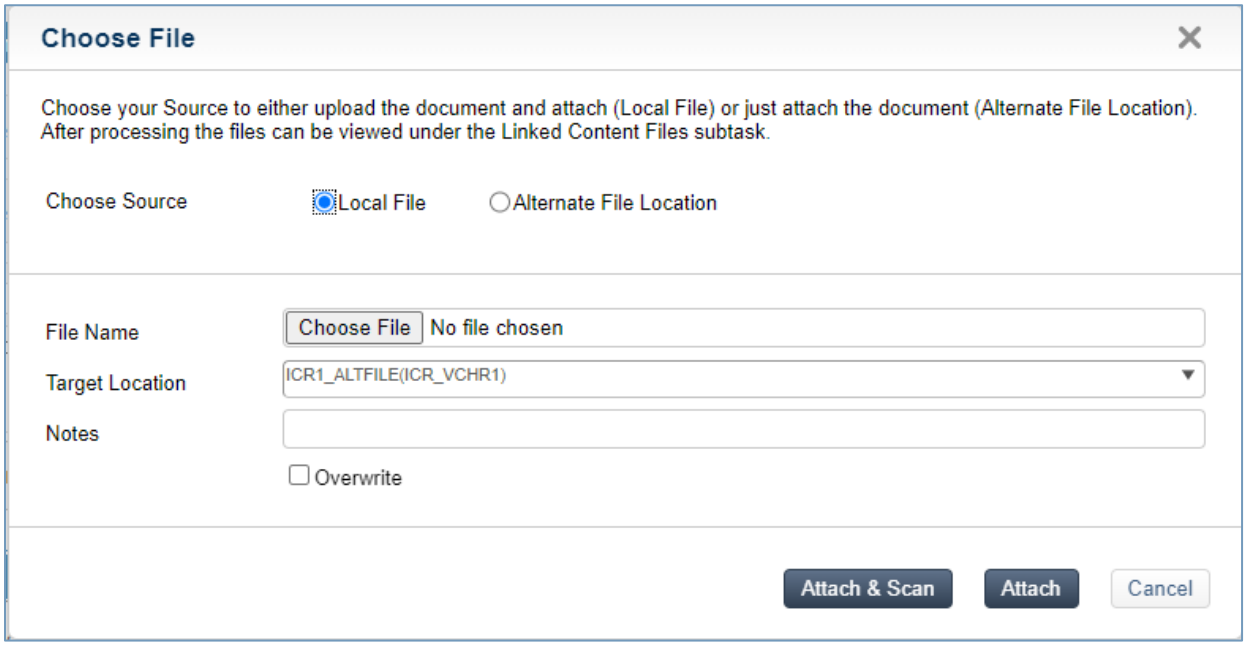
- Main Screen
  - **Vendor ID**
  - **Vendor Name**
  - **Terms**
  - **Currency Group Box**
    - **Trans**
    - **Pay**
- Header Info Tab
  - **Invoice Group Box**
    - **Number**
    - **Date**
    - **Amount**
    - **Discount Group Box**
    - **Amount**
    - **Due Group Box**
    - **Date**
- Details Tab
  - **Reference Only Group Box**
    - **PO**
- Notes/Doc Loc Tab
  - **Notes**

> **Note:** In this field, Costpoint enters the following information:
>
> - The original vendor name as scanned
> - The original invoice number as scanned (if it exceeds the **Invoice Number** field length on the screen and is truncated)
> - The original PO number as scanned (if it exceeds the **PO Number** field length on the screen and is truncated)
> - Total invoice tax amount, for reference only (Costpoint does not support direct processing of sales tax from a scanned invoice)

You can upload the following file formats:

File Type	Extension
Image	.jpg, .jpeg, .png, .gif, .bmp
Document	.pdf
Text	.txt
HTML	.htm, .html

When you click **Attach**, the Choose File window displays. In the Choose File window, you can either upload a document and attach a file from your computer, or attach a document from an alternate file location in Costpoint.



The Choose File window contains the **Attach & Scan** and the **Attach** buttons. Click **Attach & Scan** to link the document to a record and populate the record with information scanned from the document. Otherwise, click **Attach** to plainly attach the file to the record.

After you attach a file, you can click the drop-down list of the **Attach** button and select **View Linked Content Files** to open the Linked Content Files subtask where you can maintain, view, and delete attachments.

Note: Use the Content Data Fields table window of the Manage Application/Content Links screen to define which information from the scanned documents will be used to populate the fields on the Manage Accounts Payable Vouchers screen.

Same-Day ACH Payment

Same-day ACH is an optional way to process US bank ACH payments faster, enabling businesses and consumers to send and receive payments and payment-related information on the same day through the ACH Network. This functionality, first introduced in 2016, has expanded in scope through multiple implementation phases and currently supports three same-day submission windows with a limit of 1,000,000 US Dollars per transaction.

The Create EFT File screen was updated to support the same-day ACH payment feature in Costpoint.

Create EFT File Screen Enhancements

The Create EFT File screen currently provides standard processing for ACH payments. To support same-day ACH, the following were added to this screen.

Field	Description
Same Day ACH	Select this checkbox to indicate that the payment is to be processed on the same day as the **Effective Date**. This field displays only if the **EFT Format Type** is **ACH**.

Same Day Window Options Group Box

Field	Description
Same Day Window	Select the processing time window for your payment. The options in this drop-down list follow the ACH schedules and funds availability for same-day payments. ▪ **1PM Window** ▪ **5PM Window** ▪ **6PM Window**
Bank Submission Deadline	This field displays the time you must submit the ACH file to your company's bank. **Note:** Once you create the same-day ACH file, be sure to submit it to your company's bank on the **Effective Date** you entered, before the **Bank Submission Deadline** time.

Note: If you submit a same-day ACH file that has a past **Effective Date**, the transaction will be processed in the next available processing window, either on the same day or the next day.

Vendor Labor Subtask Enhancement in Manage Accounts Payable Vouchers

The Vendor Labor subtask on the Manage Accounts Payable Vouchers screen was updated to display a standard asterisk to the **Effective Billing Date** column header to indicate that the effective billing date is required.

Vendor Updates Through Supplier Portal

For Supplier Portal users, you can use the new Manage Vendors (SPMVEND) screen in the Materials domain, a simplified version of the same screen (APMVEND) in the Accounting domain, to view your profile and view or update your contacts, employees, and employee labor information. You can also attach documents via CMI and request changes to your profile through notes.

When you update a record through the Manage Vendors screen in Supplier Portal, the changes are reflected on the Manage Vendors screen in the Accounting domain.

Configure Vendor Settings Screen Enhancements

Two new fields were added to the Configure Vendor Settings screen:

- **Admin Email Address**: Use this new field in the **Pay Vendor** group box to enter the default email address of the entity assigned to manage the vendor information. When Supplier Portal users update their information, notifications will be sent to the email address entered in this field.

  To enter multiple addresses, use a semicolon (;) as a separator.
- **Supplier Portal Default Manager**: Use this new field in the **Vendor Employee ID Options** group box to enter or select the default vendor employee manager for Supplier Portal.

Manage Vendors (APMVEND) Screen Enhancements

Multiple changes were made to the Manage Vendors screen to support vendor updates through Supplier Portal.

Header Tab

Use the new **Admin Email Address** field to enter the default email address of the entity assigned to manage the vendor information. When Supplier Portal users update their information, notifications will be sent to the email address entered in this field. To enter multiple addresses, use a semicolon (;) as a separator.

The value of this field defaults to the address entered in same field on the Configure Vendor Settings screen.

Action Information Tab

This new tab contains the new **Notes** field to allow communication between the Accounts Payable administrator and Supplier Portal users. Use the **Notes** field to enter any action notes related to the vendor's information.

Contacts Subtask

Two new fields were added to the Contacts subtask of the Addresses subtask.

- **Supplier Portal Admin**: Select this checkbox to enable email notifications to be sent to this vendor contact when the Accounts Payable administrator enters notes on the Action Information tab. Only one contact per vendor address must have this checkbox selected. If you select this checkbox, you must enter the contact's **Email Address**.
- **Created by Supplier**: This checkbox indicates the creator of the contact record. If this checkbox is selected, the contact is created through Supplier Portal. Otherwise, the contact is created by the Accounts Payable administrator. On the Manage Vendors (APMVEND) screen, this checkbox is not selected by default.

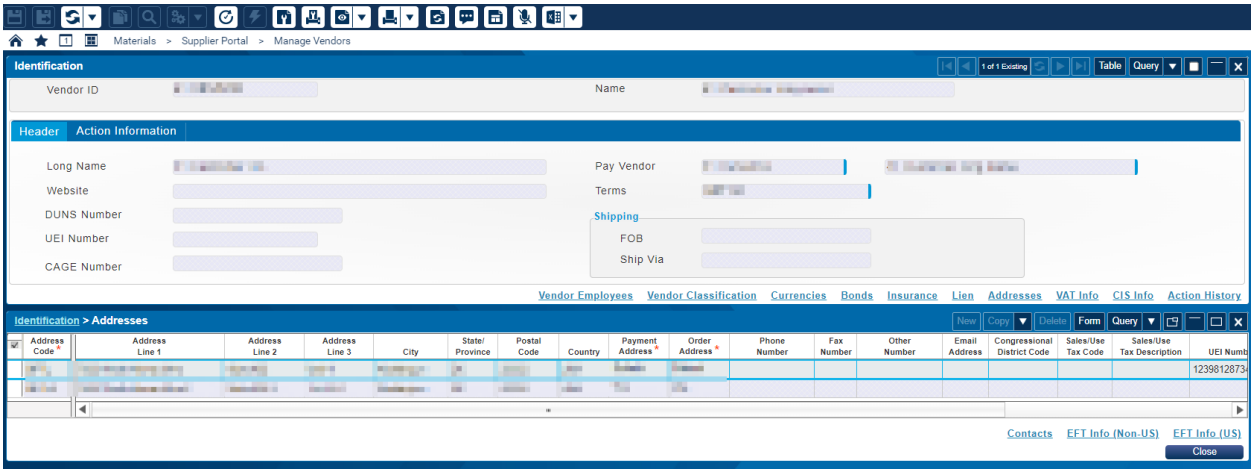
Action History Subtask

This new subtask displays the changes made to the vendor record and the communication history between the Accounts Payable administrator and the Supplier Portal user. It contains the following fields:

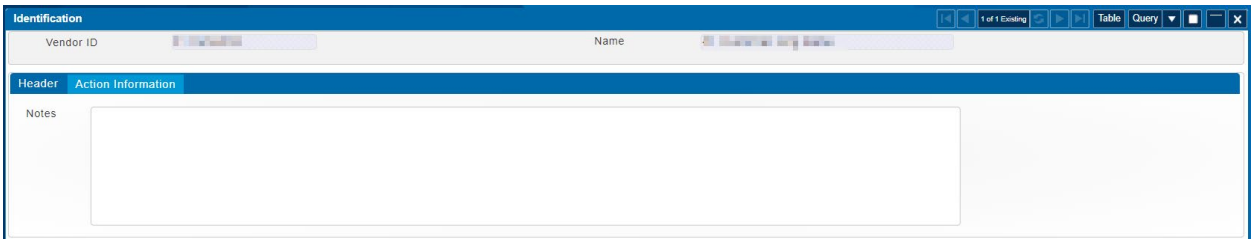
- **Action**: This field displays the type of action applied to the vendor's information. If the Accounts Payable administrator initiated the action, this drop-down list is blank.
- **Notes**: This field displays notes related to the action that was applied to the vendor's information.
- **Modified Date/Time**: This field displays the date and time when the vendor's information was modified.
- **Modified By**: This field displays the entity that applied the modification to the vendor's information.

Manage Vendors (SPMVEND) Screen

This new screen in Costpoint Materials is a simplified version of the same screen (APMVEND) in the Accounting domain. To access this screen, click **Materials » Supplier Portal » Manage Vendors**.



Use this screen to view your profile and to view or update your contacts, employees, and employee labor information. You can also attach documents via CMI and request changes to your profile through the **Notes** field on the Action Information tab.



Set Up Company Screen Enhancements

The Set Up Company screen was updated to include the information from the new Manage Vendors (SPMVEND) screen and the new **Admin Email Address** field on the Configure Vendor Settings screen when you create a new company.

CRM & Contracts

This section describes Costpoint 8.2 enhancements for the CRM & Contracts domain.

Activities Enhancements: Customers and Vendors

Previous functionality allowed you to associate customers and vendors to activities in the CRM & Contracts domain through the Resources subtask of the Manage Activities screen.

In Costpoint 8.2, we made it easier for you to link, view, and track activities for customers and vendors by adding the Activities subtask to the Manage Contract Management Customer Info and Manage Contract Management Vendor Info screens. This change now allows you to manage activities associated with customers or vendors in a single location.

Manage Contract Management Customer Info (CTMCUST) and Manage Contract Management Vendor Info (CTMVEND)

Warning: Before you can use the Activities subtask on these screens, at least one contact must exist for the prospective or regular customer/vendor record. If there is no contact linked to the customer/vendor record and you click the Activities subtask, Costpoint displays an informational message, and you will not be able to enter a record.

To enable the Activities subtask, you must create a record on the Address/Contact Info subtask as well as on the Contacts subtask.

In addition, a record must exist on the Resources subtask of the Activities subtask before you can save an activity record.

The Activities subtask added to these screens has the same functionality as the stand-alone Manage Activities screen. Here, you can:

- Create a new activity and link it to the customer/vendor. You can also link the same activity to an opportunity, contract, or subcontract record.
- Add tasks to the activity via the Tasks subtask.
- Associate the activity with another customer/vendor or other resources (such as employees or leads) through the Resources subtask.
- Add the activity or task to your Outlook calendar.
- View and manage all activities associated with the customer/vendor.

Activities you create on the Activities subtask in Manage Contract Management Customer Info and Manage Contract Management Vendor Info will be available within the Manage Activities screen and associated Activities subtasks. Similarly, activities associated with customer/vendor records through Manage Activities or the Activities subtask on the other screens will be available on the Activities subtask of Manage Contract Management Customer Info or Manage Contract Management Vendor Info.

Creating or Assigning Activity IDs

Similar to Manage Activities, when creating a new activity in the respective customer or vendor screen, you can either manually enter an activity ID or leave the **Activity ID** blank to have Costpoint automatically assign an ID if the **Auto-Assign Activity IDs** checkbox is selected on the Configure Contract Management Settings screen.

Adding Activity/Task to Outlook Calendar

You can add the activity or task to your Outlook calendar by clicking the **Download Outlook (.ics)** button on the Activities or Tasks subtask. Note, however, that this button will be available only after you save the activity/task record and is visible only in Form view.

After you download the calendar (.ics) file, you can click the file on the browser window, or you can open it from your Downloads folder. You can save the file as is, or edit it before adding it to your Outlook calendar. The task or activity start and end dates, description, and other information are included in the file.

Resources Subtask

You **must** take note of the following before saving an activity record on the Activities subtask or deleting a record on the Resources subtask:

- A record must exist on the Resources subtask before you can save a new activity. An error message displays when you try to save an activity with no Resources records.
- When you open the Resources subtask, a default record is automatically entered:
  - In Manage Contract Management Customer Info, the **Prospective Customer ID** or **Customer Account** value from the header screen defaults in the **Business ID** field. You must enter a value in the **Resource ID** field before saving the record on the Resources subtask.
  - In Manage Contract Management Vendor Info, the **Prospective Vendor ID** or **Vendor ID** value from the header screen defaults in the **Business ID** field. You must enter values in the **Resource ID** and **Seq No** fields before saving the record on the Resources subtask.
- When you try to delete the default record on this subtask, a warning message displays, informing you that deleting the default record will also delete the entire activity record.

Activities Enhancements: New Fields and Updates to the Calendar File

New fields have been added to the Manage Activities screen to include start and end dates/times as well as the ability to mark an activity as an all-day event. These new items are also included in the downloaded calendar (.ics) file that you can add to your Outlook schedule.

Manage Activities (CTMACTV)

The **Activity Date** field on the main screen has been removed and replaced by the following new fields.

Field	Description
Start Time	Enter or select the start date for the activity. For new activity records, this field defaults to the system date, but you can edit it. In the unlabeled field to the right, enter the start time for the activity. For new activity records, this field defaults to the system time, but you can edit it. When you modify this time, Costpoint automatically adds 30 minutes to the end time, but the end time will still be editable. If the **All Day Event** checkbox is selected, only the start date can be edited. The start time is disabled and defaults to **12:00 AM**.

Field	Description
End Time	Enter or select the end date for the activity. For new activity records, this field defaults to the system date, but you can edit it. In the unlabeled field to the right, enter the end time for the activity. For new activity records, this field defaults to the system time, but you can edit it. If the **All Day Event** checkbox is selected, both the end date and end time are disabled. The end date defaults to the start date, and the end time defaults to **12:00 AM**.
All Day Event	Select this checkbox to mark the activity as an all-day event. Selecting this checkbox disables the start time as well as the end date and end time.

This information is now included in the calendar file that you can download by clicking the **Download Outlook (.ics)** button. Note that this button is visible only in Form view and will become available after you save the activity record.

Validations are in place to check whether the end date and time are earlier than the start date and time so you can accurately set the duration of the activity.

Note: If you have existing records on the Manage Activities screen and you upgrade to Costpoint 8.2, the system will populate the **Start Time** and **End Time** fields with the date/time previously stored in the **Activity Date** field.

Other Applications

Updates to the Manage Activities screen were also applied to the existing Activities subtask of the following screens:

- Manage Opportunities (CTMOPP)
- Manage Contracts (CTMCNTR)
- Manage Subcontracts (CTMSBCNTR)
- Manage Leads and Contacts (CTMLEAD)

The new Activities subtask added to the Manage Contract Management Customer Info and Manage Contract Management Vendor Info screens also reflects the enhancements made in Manage Activities.

Add New Field Values via Lookup

You can now create new records faster through the **Add New** button added to the field Lookup window.

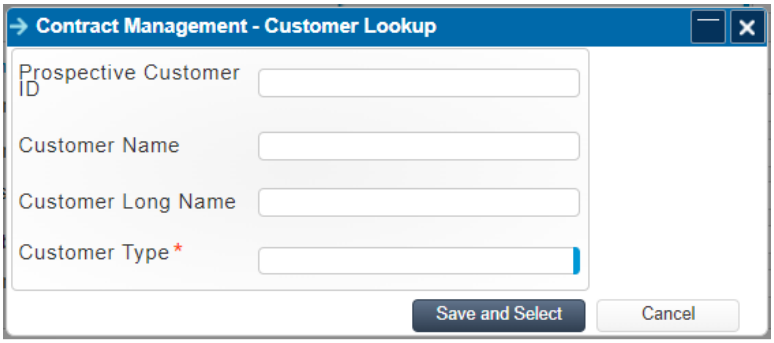
For example, if you want to add a prime contractor to an opportunity record but the prime contractor record does not yet exist, you can click the **Lookup** icon in the field, and then click **Add New** on the Lookup window to create the prime contractor record. After Costpoint creates the record, it is automatically added to the field in the original opportunity record.

Depending on the field, this new option lets you do one of the following actions:

- Directly create a new record.
- Launch the application where you can add the new record.

For Costpoint 8.2, the new button is available only in the following fields on the General tab of the Manage Opportunities screen:

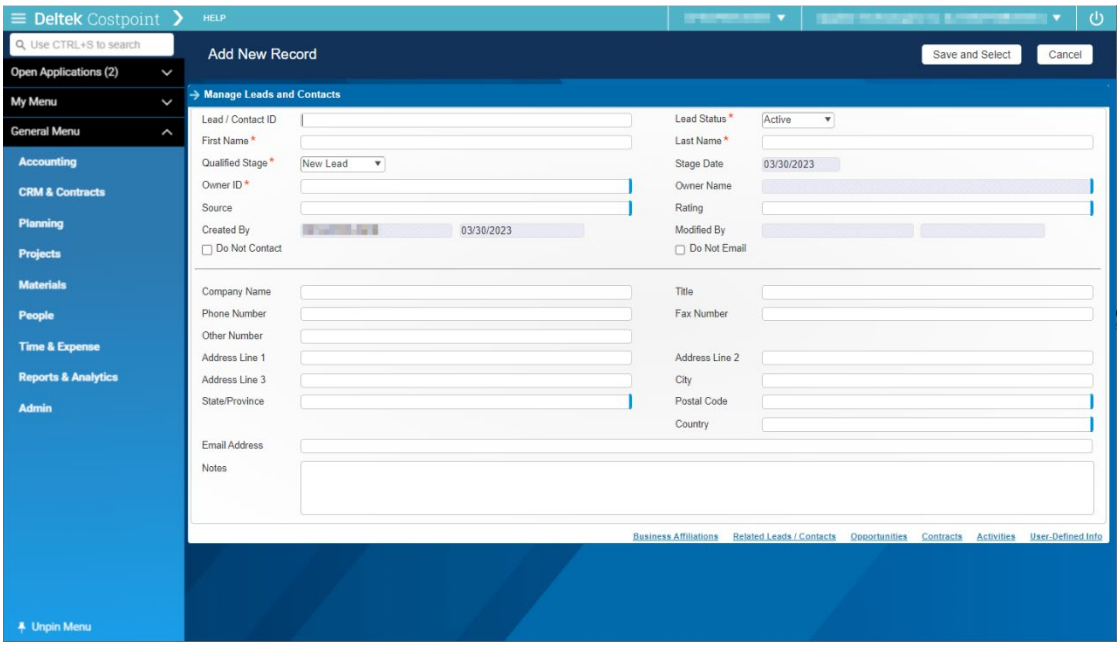
- **Prime Contractor**: You can directly add a record via Lookup. When you click **Add New**, the following window displays, and you can enter the details for the prime contractor:



  Click **Save and Select** to save and insert this new record into the **Prime Contractor** field. Costpoint also saves this prime contractor/prospective customer record to the Manage Contract Management Customer Info screen.

  Clicking **Cancel** takes you back to the Lookup window, and you can select an existing prime contractor record.

- **Lead Contact**: When you click **Add New** on this field's Lookup window, Costpoint launches the Manage Leads and Contacts application via the Add New Record window. Enter here the lead/contact details of the record you want to add.



  Click **Save and Select** to save and insert this new record into the **Lead Contact** field. Costpoint also saves this lead/contact record to the Manage Leads and Contacts screen.

  Clicking **Cancel** takes you back to the Manage Opportunities screen with the Lookup window open, and you can select an existing lead/contact record.

GovWin IQ Enhancement: CMMC Information for Vendors

The US Department of Defense (DoD) created the Cybersecurity Maturity Model Certification (CMMC) to safeguard information and protect it against cyber threats. The CMMC framework requires companies that handle national security information to comply with cybersecurity standards. Contractors dealing with sensitive unclassified DoD information are assessed and will be required to meet a specific CMMC level before a contract can be awarded.

Attention: For additional information on CMMC, refer to https://dodcio.defense.gov/CMMC/.

Costpoint 8.1 added CMMC information to the Status tab of the Manage Opportunities screen to allow you to include CMMC details to opportunity records. If the opportunity came from GovWin IQ, the CMMC level information is copied from GovWin IQ into Costpoint.

Costpoint 8.2 expands this functionality to vendors and prospective vendors. For records manually created within Costpoint, you can now indicate the CMMC level for the specific prospective or regular vendor. For records imported from GovWin IQ, the vendor's CMMC level information defaults from GovWin IQ.

Manage Contract Management Vendor Info (CTMVEND)

On the General tab, select the CMMC level associated with the prospective vendor through the new **CMMC Level** drop-down list. Valid options are:

- **None**
- **1**: Performed processes, basic cyber hygiene practices
- **2**: Documented processes, intermediate cyber hygiene practices
- **3**: Managed processes, good cyber hygiene practices
- **4**: Reviewed processes, proactive cyber hygiene practices
- **5**: Optimizing processes, advanced/progressive cyber hygiene practices

If the prospective vendor is imported from GovWin IQ, the **CMMC Level** value defaults from GovWin IQ but can be modified.

Approve Prospective Vendors (CTMVENDA)

With the addition of **CMMC Level** to the Manage Contract Management Vendor Info screen, Approve Prospective Vendors has been updated to transfer the value of this new drop-down list from the CT_VEND table to the VEND table upon approval of the prospective vendor.

Manage Vendors (APMVEND)

In the Business Classification section of the Vendor Classification subtask, select the CMMC level of the vendor through the new **CMMC Level** drop-down list. Valid options are:

- **None**
- **1**: Performed processes, basic cyber hygiene practices
- **2**: Documented processes, intermediate cyber hygiene practices
- **3**: Managed processes, good cyber hygiene practices
- **4**: Reviewed processes, proactive cyber hygiene practices

- **5**: Optimizing processes, advanced/progressive cyber hygiene practices

For vendors imported from GovWin IQ or the Import Vendors screen, the value of this field defaults to the imported vendor's CMMC level but can be modified.

Import GovWin IQ Vendor Data (APPIQVEN)

The vendor's CMMC level is now included in the data transfer when you import vendors from GovWin IQ into Costpoint.

Import Vendors (AOPUTLVU)

You can now enter a vendor's CMMC level to the input file or database table when you import vendors into Costpoint.

GovWin IQ Enhancement: Canadian Bid Details for Opportunities

Canadian bid information from GovWin IQ is now included in the data transfer when you import opportunities from GovWin IQ into Costpoint. This enables you to view the opportunity's total value, expected contract value (**Our Value**), and weighted revenue in both the functional and CAD currencies. Additional fields are made available in Manage Opportunities to give more details on Canadian bid records imported from GovWin IQ.

Manage Opportunities (CTMOPP)

On the Status tab, under the **Value and Key Dates** group box, there are now two columns (**Functional Currency** and **Transactional Currency**) to display opportunity values in the functional and CAD currencies.

Under **Transactional Currency**, the following fields have been added:

- **Transactional Total Value**: This field displays the total opportunity value in CAD. This value comes from GovWin IQ but can be edited.
- **Transactional Our Value**: Use this field to enter the contract value in CAD that you expect your company will earn should you be awarded the contract associated with the opportunity.
- **Transactional Weighted Revenue**: Costpoint calculates this field as **Transactional Our Value** × **Win Probability**.
- **Transaction Currency Code**: This field displays **CAD** and cannot be edited.

The following notice has also been added under the column labels:

> "Currency Notice: Currency conversion done at time of publication."

Note: In Form view, the **Transactional Currency** column and its corresponding fields as well as the **Currency Notice** are visible only for Canadian bid records from GovWin IQ. In Table view, these fields are visible but disabled if the transaction currency code is not CAD.

The GovWin IQ subtask has also been updated to add new fields to the **Details** group box. The following items are now available for Canadian bid records from GovWin IQ:

- **Estimated Value (CAD)**: This field displays the potential value of the opportunity in CAD, as transferred from GovWin IQ.

- "Currency Notice: Currency conversion done at time of publication in GovWin IQ.": This message displays to the right of **Estimated Value (CAD)**.
- **GSIN**: This field displays the Goods and Services Identification Number (GSIN) associated with the opportunity, as transferred from GovWin IQ. If the record already has a value in **UNSPSC**, this field will be blank.
- **UNSPSC**: This field displays the United Nations Standard Products and Service Code (UNSPSC) associated with the opportunity, as transferred from GovWin IQ. If the record already has a value in **GSIN**, this field will be blank.
- **Trade Agreements**: This field displays the Trade Agreements indicated for the opportunity, as transferred from GovWin IQ.

Note: These new fields are visible on the GovWin IQ subtask only for Canadian bid records imported from GovWin IQ.

Import GovWin IQ Data (CTPIQDAT)

This application has been updated to include Canadian bid information when importing opportunity data from GovWin IQ into Costpoint.

Manage Leads and Contacts Enhancements

Enhancements to the Manage Leads and Contacts application include new fields to store address information and other details, and the ability to load contact details from the header record into a new contact record on the Business Affiliations subtask.

New Address Information Fields

The following fields have been added to the main screen to let you specify address information for the contact/lead record:

- **Address Line 1**
- **Address Line 2**
- **Address Line 3**
- **City**
- **State/Province**
- **Postal Code**
- **Country**

Note: In **Postal Code**, when you enter a value that has been used before, Costpoint will display the city, state/province, and country associated with the postal code. If you enter a postal code that has not yet been used, the system stores it in the POSTAL_CD table along with the city, state/province, and country associated with it for future use.

None of these fields are required, but details provided here may provide additional information for the lead/contact record. In addition, you can do queries for all lead/contact records based on these items.

Other New UI Items

The **Do Not Contact** and **Do Not Email** checkboxes have been added to the main screen for informational purposes only. For example, if the lead/contact does not want to be contacted further, you can use these checkboxes to indicate that specific detail.

Note that selecting these checkboxes will not disable the phone and email functionality of Manage Leads and Contacts.

Load Contact Details from the Header into the New Contact

Costpoint 8.2 now allows you to load contact details from the header record into the new contact record created on the Business Affiliations subtask to eliminate data entry errors.

After you enter a new value in the **Contact ID** field (for customers) or **Line** field (for vendors) and tab out of the field, the **Load Contact Details** button becomes available. You can click this button to automatically load contact details from the header record into the following fields:

- **First Name**
- **Last Name**
- **Phone Number**
- **Title**
- **Email**

You can still manually enter a different value or modify these fields as needed.

> **Note:** As before, you must enter a **Business Type**, **Business ID**, and **Address Code** before the **Contact ID** or **Line** field becomes available.

More Options for Contract Customers/Contacts

To give you more flexibility in adding and managing customers and contacts linked to a contract, several updates were made to the following screens.

Manage Functional Roles (SYMROLE)

Column headings in this application have been updated to reflect the correct domain and module name.

Old Column Heading	New Column Heading
Contracts	CRM & Contracts
Subcontractors	Subcontractor Management

Five new system role codes were added to this screen.

Role Code	Description
ACQCUST	Acquisition Customer
BILLCUST	Billing Customer

Role Code	Description
CNTRREP	Contract Representative
PCO	Procurement Officer (PCO)
PRIMECUST	Primary Customer

Description of the following codes were also updated.

Role Code	Old Description	New Description
ACO	Admin Contracting Officer	Administrative Contracting Officer (ACO)
COTR	COTR	Contracting Officer's Technical Representative (COTR)

The **CRM & Contracts** checkbox for these seven roles as well as for the CO (Contracting Officer) functional role is automatically selected on this screen, but you can still change it. Note, however, that if you clear the **CRM & Contracts** checkbox for these roles, the roles will not be available on the Manage Contract Management Roles screen and, therefore, cannot be used within the CRM & Contracts domain.

As with existing functionality, you can also select the **T&E**, **BI**, and **Subcontractor Management** checkboxes for the role codes if you want to use the codes in these Costpoint areas.

Manage Contract Management Roles (CTMROLES)

The new system roles added to the Manage Functional Roles screen display automatically in Manage Contract Management Roles, given their **CRM & Contracts** checkbox remain selected in Manage Functional Roles.

In Manage Contract Management Roles, the **Customer** checkbox corresponding to these roles is selected by default, but you can clear it. Note, however, that when you clear this checkbox for a specific role, that role will not be available for use as a customer role on various screens in the CRM & Contracts domain.

The updated role code descriptions for existing roles in Manage Functional Roles are also reflected on this screen.

Manage Contracts (CTMCNTR)

The following columns were added to the Customers/Contacts tab of this screen to give you more options in adding and managing contacts that you want to associate with the contract:

- **Role Code**: Enter or use lookup to select the role code for the contact that you want to link to the contract.

  You can use the same role code multiple times on this tab, given you associate the role with different customer IDs and contact IDs. Only unique role code/customer ID/contact ID combinations are allowed.
- **Active**: Select this checkbox if the contact is currently active. Multiple records can have this checkbox selected.
- **Primary**: Select this checkbox for the primary contact. There can be only one **Primary** contact for each role code. If you select this checkbox for more than one record with the same role code, Costpoint displays an error message.

Other updates to the tab include the following:

- These column labels have been renamed.

Old Column Label	New Column Label
Contact Type Description	Role Description
Customer	Customer ID
Name	Customer Name

- The **Customer Name** is now displayed as a hyperlink that you can click to open the customer record on the Manage Contract Management Customer Info screen.
- The **Load All Contact Types** button has been removed.

The Project Initialization subtask has also been updated to copy existing information from the Customers/Contacts tab into the Manage Project User Flow screen and the project database tables when initializing or updating projects from a contract record.

The following table lists the fields updated in Manage Project User Flow with contact role information from Manage Contracts.

Role in Customers/Contacts Tab in Manage Contracts	Fields Updated in Manage Project User Flow
Administrative Contracting Officer (ACO)	Gov't Contract subtask » Contract Details tab » **Administrative Officer** field Gov't Contract subtask » Telephone Numbers tab » **Administrative Contracting Officer** group box
Contracting Officer	Gov't Contract subtask » Contract Details tab » **Contract Officer** field
Contract Representative	Gov't Contract subtask » Contract Details tab » **Contractor Representative** and **Contractor Representative Title** fields Gov't Contract subtask » Telephone Numbers tab » **Contractor Representative** group box
Procurement Officer (PCO)	Gov't Contract subtask » Contract Details tab » **Procurement Officer** field
Primary Customer	Main screen » Details tab » **Customer** and **Customer Name** fields

The **Primary** checkbox for the contact record on the Customers/Contacts tab must be selected for the contact information to flow to the newly created or updated project.

For multiple contact records using the same role code on this tab, only the information for the record with the **Primary** checkbox selected will be carried over to the destination project. If the **Primary** checkbox is not selected in any of these records, no contact information for this role code will be copied to the destination project.

Manage Subcontracts (CTMSBCNTR)

The new **Primary Customer ID** field on the General tab of this screen displays the primary customer ID from the contract record linked to the subcontract. The unlabeled field to the right of this field displays the primary customer name as a hyperlink that you can click to open the customer record on the Manage Contract Management Customer Info screen.

The information that defaults in **Primary Customer ID** comes from the customer record with a **Role Code** of **PRIMECUST** (Primary Customer) and has the **Primary** checkbox selected on the Customers/Contacts tab of the Manage Contracts screen. If there are multiple records on this tab using the same **PRIMECUST** role code but no **Primary** checkbox is selected in any of these records, no primary customer information will default in Manage Subcontracts.

Manage Leads and Contacts (CTMLEAD)

The Contracts subtask on this screen displays the contract linked to the lead/contact record as well as the contacts associated with the contract. In Costpoint 8.2, this subtask has additional columns, **Active** and **Primary**, that let you know if the contact is currently active and/or selected as primary contact for the contract. Selection of these checkboxes defaults from the Customers/Contacts tab of the Manage Contracts screen and cannot be modified in Manage Leads and Contacts.

On the same subtask, the **Contact Type** column label has been updated to **Role Description**.

Print Contract Vehicle Report (CNRVEH)

This screen now prints only contracts with an associated prime customer set as the primary contact (that is, the **Primary** checkbox is selected in a **PRIMECUST** contact record linked to the contract on the Customers/Contacts tab of the Manage Contracts application).

If no primary **PRIMECUST** record exists within the selection criteria you specified on the Print Contract Vehicle Report screen, no data will display on the report.

New Fields for Opportunities, Contracts, and Subcontracts

New fields and several other changes were made to the following screens to allow you to determine who created and last updated opportunity, contract, and subcontract records, as well as link organizations to contracts and subcontracts.

Manage Opportunities (CTMOPP)

Updates to the General tab of Manage Opportunities include the following:

- These new fields are now available on this tab:
  - **Created By**: This field displays the user ID of the person who created the opportunity record. The unlabeled field to the right of this field displays the date when the record was created.

    If the record was imported from GovWin IQ, these fields display the user ID of the person who marked the opportunity record in GovWin IQ for transfer to Costpoint, and the date that the record was imported into Costpoint.
  - **Modified By**: This field displays the user ID of the person who last modified the opportunity record. The unlabeled field to the right of this field displays the date when the record was last modified.
- Some fields have been repositioned to give you a better user experience.

- In the **Responsible Business Unit and Managers** group box, the name fields corresponding to the following fields are no longer editable:
  - **Business Unit**
  - **Organization**
  - **Business Unit Lead**

On the Status tab, the following changes have been made:

- **Stage**: This field's lookup now includes the **Sequence Number** column. Lookup entries are now also sorted based on this new column.
- **Notes**: This field now allows up to 99,999 characters to capture more information about the opportunity.
- **Number of Days Open**: This new field displays the number of days that the opportunity record has been open. You can use this field to determine if the opportunity needs to be reassessed or prioritized. Costpoint calculates this field as follows:
  - If the **Stage** assigned to the opportunity has a win or loss value (that is, **Win / Loss** in Manage Opportunity Stages is set to either **Win** or **Loss** for the stage code), number of days open is calculated as **Modified Date - Date Opened**.
  - If the opportunity's record status is **Inactive**, number of days open is calculated as **Modified Date - Date Opened**.
  - For any other scenarios, this field is calculated as **System Date Today - Date Opened**.

Manage Contracts (CTMCNTR)

Similar to Manage Opportunities, this screen has the following new fields on the General tab:

- **Created By**: This field displays the user ID of the person who created the contract record. The unlabeled field to the right of this field displays the date when the record was created.
- **Modified By**: This field displays the user ID of the person who last modified the contract record. The unlabeled field to the right of this field displays the date when the record was last modified.

> **Note:** The **Modified By** and **Date** fields replaced the **Date Last Modified** field on the General tab.

In addition, a new **Business Unit and Organization** group box is now available on the General tab with the following fields:

- **Business Unit**: Enter or select the business that you want to assign to the contract. If the contract is associated with an opportunity and that opportunity is already linked to a business unit, that business unit displays in this field by default.

  The unlabeled field to the right of this field displays the business unit description.
- **Organization**: Enter or select the organization that you want to assign to the contract. If the contract is associated with an opportunity and that opportunity is already linked to an organization, that organization displays in this field by default.

  The unlabeled field to the right of this field displays the organization name.

Minor updates to the General tab include the following:

- The **Subcontract Administrator** and **Contract Administrator** fields have been renamed to **Subcontract Admin** and **Contract Admin**, respectively.

- Some fields have been rearranged for a better user experience.

The Project Initialization subtask has been updated to take into account the new **Organization** field added to the General tab. When mass adding/updating projects using this subtask, Costpoint assigns the organization stated in the contract as the owning organization of the newly created/updated destination projects, even if the template project used in the process has a different owning organization. If the contract's **Organization** field is blank, the template project's owning organization will default in the destination projects.

On the Classification tab, the **Statement of Work** field now allows up to 99,999 characters so that you can include more details on the contract's statement of work.

On the Contract Info tab, the **CMMC Requirements** field has been added. You can use this field to enter the Cybersecurity Maturity Model Certification (CMMC) requirements related to the contract. If the contract record is linked to an opportunity, that opportunity's CMMC requirement information defaults in this field.

Manage Subcontracts (CTMSBCNTR)

Updates to the General tab of this screen include the following new fields:

- **Organization**: Enter or select the organization that you want to assign to the subcontract. If you leave this field blank and you enter a value in the **Contract ID** or **Opportunity ID** field, the organization linked to the contract or opportunity defaults here.

  If a value already exists in this field and you enter a **Contract ID** or **Opportunity ID** with an assigned organization, the value in this field will not be overwritten.

  > **Note:** If you have existing records and you upgrade to Costpoint 8.2, the organization assigned to the opportunity will be copied to the associated subcontract records. If the opportunity linked to the subcontract record has not been assigned an organization, the **Organization** field will remain blank.

- **Created By**: This field displays the user ID of the person who created the subcontract record. The unlabeled field to the right of this field displays the date when the record was created.
- **Modified By**: This field displays the user ID of the person who last modified the subcontract record. The unlabeled field to the right of this field displays the date when the record was last modified.
- **Primary Customer ID**: This field displays the primary customer ID from the contract record linked to the subcontract. The unlabeled field to the right of this field displays the primary customer name.

On the Scope of Work tab, the **Scope of Work** field now allows up to 99,999 characters to give you more space for the subcontract's scope of work details.

Manage Business Units (CTMOPPBU)

Previously labeled as Manage Opportunity Business Units, this application has been renamed to Manage Business Units to reflect the use of business units not just in opportunities, but also in other areas of CRM & Contracts.

This application has also been moved from the Opportunities application group to the Contract Management Controls application group. You can now access this screen via the following path:

CRM & Contracts » Contract Management Controls » Contract Management Controls » Manage Business Units.

Organization Security in CRM & Contracts

Costpoint 8.2 allows you to enable and disable organization security for various applications in the CRM & Contracts domain. By using organization security, you can ensure that correct user access is applied to the logged-in user ID in accessing records. The organization security feature validates and filters records as authorized for the user ID.

Organization security is specific to companies, modules, and applications. To enable this feature for the logged-in company, select the **Apply Organization Security** checkbox on the Company Settings tab of the Configure System Settings screen. You can then apply organization security to specific modules and/or applications.

On the Activate/Inactivate Organization Security by Module screen, more modules are now listed for the CRM & Contracts domain. You can select the **Apply Org Security** checkbox for any of these module(s) and also for the application(s) that display in the Applications table window. The following table lists the modules and screens where organization security can be applied in CRM & Contracts.

Module	Application ID	Application Name
Activities	CTMACTV	Manage Activities
Contracts	CNQCTF	View Contract Financial Information
	CNRADM	Print Contracts by Administrator Report
	CNRBKL	Print Contract Backlog Report
	CNREXP	Print Vendor COI & NDA Expiration Report
	CNRVEH	Print Contract Vehicle Report
	CTMCNTR	Manage Contracts
	CTMSBCNTR	Manage Subcontracts
	CTQSUBC	View Subcontract Inquiry
Contract Management Controls	CTMOPPBU	Manage Business Units
Opportunities	CTMOCI	Manage Organizational Conflict of Interest (OCI)
	CTMOPP	Manage Opportunities
	OPRCPL	Print Opportunity Current Pipeline Report
	OPROPN	Print Opportunity Days Open Report
	OPRWLS	Print Opportunity Win Loss Report
Resources	CTMCUST	Manage Contract Management Customer Info
	CTMEMPL	Manage Contract Management Employee Info

Module	Application ID	Application Name
	CTMLEAD	Manage Leads and Contacts
	CTMVEND	Manage Contract Management Vendor Info

Once organization security is enabled, the application considers the organization security profile and group settings configured for the logged-in user ID on the Manage Organization Security Profiles and Manage Organization Security Groups screens.

Note: For administrators who need access to see records or run reports across multiple companies, you must include each organization in their organization security profile.

The organization is not a required field in CRM & Contracts. If organization security is activated and the organization field is blank, all users with security rights to the module and assigned an organization security profile will be able to see the records. If the organization field is not blank and organization security is enabled, users will have access only to records with an organization ID that matches the users' organization in the organization security profile.

See the following sections for the specific changes implemented in each application.

Manage Activities (CTMACTV)

These are the updates to the main screen:

- When the application launches records, organization security will be based on the user's organization security profile against the organization assigned to the **Activity Owner**, **Opportunity ID**, **Contract ID**, or **Subcontract ID** field.

  If all these fields do not have an assigned organization, users with access to this application will see the records.
- When you enter values in **Activity Owner**, the lookup and manual entry will display records with an organization that matches an organization in the user's security profile.
- When you enter values in **Opportunity ID**, **Contract ID**, or **Subcontract ID**, the lookup and manual entry will display records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.
- Hyperlinks that display on this screen will launch the specific record only if the user has rights to the application and the record's organization is included in the user's security profile.

On the Resources subtask, if **Resource Type** is **Employee** or **Lead**, the lookup and manual entry in the **Resource ID** field will display only records with an organization included in the user's security profile. If no organization is assigned to the employee/lead record, the record will not be available for selection.

On the Tasks subtask, if **Owner Type** is **Employee** or **Lead**, the lookup and manual entry in the **Task Owner ID** field will display only records with an organization included in the user's security profile. If no organization is assigned to the employee/lead record, the record will not be available for selection.

View Contract Financial Information (CNQCTF)

In the **Selection Criteria** group box, the lookup of the **Contract ID** and **Opportunity ID** fields will display records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.

In the Contract Financial Information table window, records are filtered based on the values specified in **Selection Criteria**, as in existing functionality. Note, however, that when organization security is enabled, the hyperlinks in **Contract ID** and **Opportunity ID** will launch the specific record only if the user has rights to the respective application and the record's organization is included in the user's security profile.

Print Contracts by Administrator Report (CNRADM)

The **Start** and **End** field lookup and manual entry for **Administrator ID** and **Administrator Name** will display employee records with an organization that matches an organization in the user's security profile.

For contract records with an assigned organization, only those records with an organization included in the user's security profile will be printed on the report when organization security is enabled.

Contract records with no assigned organization will display on the report for all users who have access to this application.

Print Contract Backlog Report (CNRBKL)

For contract records with an assigned organization, only those records with an organization included in the user's security profile will be printed on the report when organization security is enabled.

Contract records with no assigned organization will display on the report for all users who have access to this application.

Print Vendor COI & NDA Expiration Report (CNREXP)

The **Start** and **End** field lookup for **Subcontract ID** and **Contract ID** will display subcontract/contract records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.

For subcontract/contract records with an assigned organization, only those records with an organization included in the user's security profile will be printed on the report when organization security is enabled.

Subcontract/contract records with no assigned organization will display on the report for all users who have access to this application.

Print Contract Vehicle Report (CNRVEH)

For contract records with an assigned organization, only those records with an organization included in the user's security profile will be printed on the report when organization security is enabled.

Contract records with no assigned organization will display on the report for all users who have access to this application.

Manage Contracts (CTMCNTR)

Manage Contracts follows this logic when organization security is on:

- When the application launches a contract record with an assigned organization, the record displays when its organization is included in the user's security profile.
- If no organization is assigned to the contract, all users that have access to this screen can view the contract record.
- When you enter values on this screen, the lookup will display records with an organization included in the user's security profile, and manually entered values will be verified against the lookup.

- All hyperlinks will apply organization security in the launched application if that application has organization security enabled.

See the following table for more details on the updates made to the main screen, tabs, and subtasks.

Tab/Subtask	Field/UI Item	Updates
Main screen	**Main Opportunity ID**	The lookup and manual entry will display opportunity records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.
	Main Opportunity Name	The hyperlink will launch the opportunity record only if the user has security rights to the Manage Opportunities screen and the opportunity organization is included in the user's security profile.
General tab	**Project Manager, Billing Analyst, Subcontract Admin, Contract Admin**	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
	Business Unit	The lookup and manual entry will display business unit records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.
	Organization	A user can assign an organization to a contract record if that organization is part of the user's security profile. Lookup will also display only those records included in the user's security profile. If the user tries to manually enter an organization that is not a part of the user's security profile, Costpoint displays an error message when the user tabs out of the field.
Team tab	**Employee / Employee ID** (Contract Employee Team and Potential Resource Details subtasks)	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed. The hyperlink will launch the employee record only if the user has security rights to the Manage Contract Management Employee Info screen and the employee organization is included in the user's security profile.

Tab/Subtask	Field/UI Item	Updates
Modifications tab	**Project, Project Link, Name**	This tab will display project records with an organization included in the user's organization security profile. If no organization is assigned to the projects linked to the contract, no project records will display on this tab. The hyperlink in **Project Link** will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.
	Project (Contract/Project Modifications subtask)	The lookup and manual entry will display project records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
Supplier/Vendor Rating tab	**Project ID**	The lookup and manual entry will display project records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
Performance Assessment tab	**Contractor Representative**	The lookup and manual entry will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed. The hyperlink in **Contract Representative Name** will launch the employee record only if the user has security rights to the Manage Contract Management Employee Info screen and the employee organization is included in the user's security profile.
	Project ID	The lookup and manual entry will display project records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
Contract Close Out tab	**Completed By, Employee Signoff**	The lookup and manual entry will display employee records with an organization included in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
Additional Task Orders subtask	**Project**	The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.

Tab/Subtask	Field/UI Item	Updates
Additional Opportunities subtask	**Opportunity ID, Opportunity Name**	The lookup and manual entry will display opportunity records with an organization included in the user's organization security profile as well as records with no assigned organization. The hyperlink in **Opportunity ID** will launch the opportunity record only if the user has security rights to the Manage Opportunities screen and the opportunity organization is included in the user's security profile.
Projects Linked subtask	**Project Link**	The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.
	Printing Project Reports	The reports will print only if the project organization is included in the user's security profile.
Subcontracts subtask	**Subcontract ID**	The hyperlink will launch the subcontract record only if the user has security rights to the Manage Subcontracts screen and the subcontract organization is included in the user's security profile.
Project Initialization subtask	**Template Project, Destination Project**	The lookup and manual entry will display project records with an organization included in the user's organization security profile.
	Owning Organization (Details subtask)	A user can assign an organization to a project row if that organization is a part of the user's security profile.
Activities subtask	General rule	If the contract organization ID is provided, the Activities subtask will display activity records related to the main record regardless of the organization assignment of the **Activity Owner**, **Opportunity ID**, and **Subcontract ID**. If the contract organization is null, the Activities subtask will display all activity records related to the main record if at least the **Activity Owner**, **Opportunity ID**, or **Subcontract ID** matches the user's organization security profile.
	Activity Owner	The lookup will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Tab/Subtask	Field/UI Item	Updates
	Opportunity ID, Contract ID, Subcontract ID	The lookup will display opportunity, contract, or subcontract records with an organization included in the user's organization security profile as well as records with no assigned organization. Hyperlinks that display on this subtask will launch the record only if the user has rights to the specific application and the record's organization is included in the user's security profile.
	Resource ID if **Resource Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Task Owner ID if **Owner Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
FAR Clauses/Provisions subtask	**Contract ID**	The lookup will display contract records with an organization included in the user's organization security profile as well as records with no assigned organization.
Supplemental Regulations subtask	**Contract ID**	The lookup will display contract records with an organization included in the user's organization security profile as well as records with no assigned organization.

Manage Subcontracts (CTMSBCNTR)

When organization security is enabled, Manage Subcontracts follows this logic:

- When the application launches a subcontract record with an assigned organization, the record displays when its organization is included in the user's security profile.
- If no organization is assigned to the subcontract, all users that have access to this screen can view the subcontract record.
- When you enter values on this screen, the lookup will display records with an organization included in the user's security profile, and manually entered values will be verified against the lookup.
- All hyperlinks will apply organization security in the launched application if that application has organization security enabled.

This table lists detailed updates to the tabs and subtasks of Manage Subcontracts.

Tab/Subtask	Field/UI Item	Updates
General tab	**Subcontractor Administrator**	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
	Organization	A user can assign an organization to a subcontract record if that organization is part of the user's security profile. The lookup will also display only those records included in the user's security profile. If the user tries to manually enter an organization that is not a part of the user's security profile, Costpoint displays an error message when the user tabs out of the field.
	Created By, Modified By	These fields will display employee records with an organization that is included in the user's security profile. If no organization is assigned to the employee records, the records will not be displayed.
	Contract ID, Opportunity ID	The lookup and manual entry will display contractor opportunity records with an organization included in the user's organization security profile as well as records with no assigned organization. Hyperlinks will launch the record only if the user has rights to the specific application and the record's organization is included in the user's security profile.
	Subcontract Project ID	The lookup and manual entry will display project records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
	Project Manager	This field will display employee records with an organization that is included in the user's security profile. If no organization is assigned to the employee records, the records will not be displayed.
	Project financial information (several fields in the **Subcontract Project Data** group box)	These fields will display information only if the project's organization is included in the user's security profile.

Tab/Subtask	Field/UI Item	Updates
Requisitions tab	**Requisition ID**	The hyperlink will launch the record only if the user has rights to the Manage Purchase Requisitions screen and the record's organization is included in the user's security profile.
Purchase Orders tab	**PO ID**	The hyperlink will launch the record only if the user has rights to the Manage Purchase Orders screen and the record's organization is included in the user's security profile.
Modifications tab	**Project, Project Link, Name**	This tab will display project records with an organization included in the user's organization security profile. If no organization is assigned to the projects linked to the subcontract, no project records will display on this tab. The hyperlink in **Project Link** will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.
	Project (Subcontract/Project Modifications subtask)	The lookup and manual entry will display project records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
Supplier/Vendor Rating tab	**Project ID**	The lookup and manual entry will display project records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
Additional Opportunities subtask	**Opportunity ID, Opportunity Name**	The lookup and manual entry will display opportunity records with an organization included in the user's organization security profile as well records with no assigned organization. The hyperlink in **Opportunity ID** will launch the opportunity record only if the user has security rights to the Manage Opportunities screen and the opportunity organization is included in the user's security profile.

Tab/Subtask	Field/UI Item	Updates
Contracts subtask	**Contract ID, Contract Name**	The lookup and manual entry will display contract records with an organization included in the user's organization security profile as well as records with no assigned organization. The hyperlink in **Contract ID** will launch the contract record only if the user has security rights to the Manage Contracts screen and the contract organization is included in the user's security profile.
Activities subtask	General rule	If the subcontract organization ID is provided, the Activities subtask will display activity records related to the main record regardless of the organization assignment of the **Activity Owner**, **Opportunity ID**, and **Contract ID**. If the subcontract organization is null, the Activities subtask will display all activity records related to the main record if at least the **Activity Owner**, **Opportunity ID**, or **Contract ID** matches the user's organization security profile.
	Activity Owner	The lookup will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Opportunity ID, Contract ID, Subcontract ID	The lookup will display opportunity, contract, or subcontract records with an organization included in the user's organization security profile as well as records with no assigned organization. Hyperlinks that display on this subtask will launch the record only if the user has rights to the specific application and the record's organization is included in the user's security profile.
	Resource ID if **Resource Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Task Owner ID if **Owner Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Tab/Subtask	Field/UI Item	Updates
FAR Clauses/Provisions subtask	**Contract ID**	The lookup will display contract records with an organization included in the user's organization security profile as well as records with no assigned organization.
Supplemental Regulations subtask	**Contract ID**	The lookup will display contract records with an organization included in the user's organization security profile as well as records with no assigned organization.

View Subcontract Inquiry (CTQSUBC)

These are the updates in the **Selection Criteria** group box.

Field	Updates
Subcontract ID, Contract ID, Opportunity ID	The lookup will display subcontract, contract, or opportunity records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.
Subcontract Project ID	The lookup will display project records with an organization that matches an organization in the user's security profile.
Prime Contract No	The lookup will display contract records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.
Contract Task Order No	The lookup will display records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.

In the Subcontract Inquiry Details table window, records are filtered based on the values specified in **Selection Criteria**, as in existing functionality. Note, however, that when organization security is enabled, the hyperlinks in **Subcontract ID**, **Contract ID**, and **Opportunity ID** will launch the specific record only if the user has rights to the respective application and the record's organization is included in the user's security profile.

Manage Business Units (CTMOPPBU)

Updates to this screen were applied to the following items:

- **Business Unit Code field (main screen)**: If the Business Unit/Org Links subtask is blank, this field displays all records. If that subtask contains organization records, the user will have access to business unit records if one or more of these organization records are part of the user's organization security profile.
- **Organization field (Business Unit/Org Links subtask)**: The lookup and manual entry will display only records included in the user's security profile.
- **Link Organizations subtask**: Regardless of what the user enters on this subtask, the Business Units/Org Links subtask will be populated only with organizations included in the user's security profile. The following header note was added to this subtask:

If Organization Security is active for this application, only organizations in the users profile will be added when selecting "Create Links."

Manage Organizational Conflict of Interest (OCI) (CTMOCI)

The new Org Links subtask on this screen allows users to link an OCI record to one or more organizations. The **Organization** field lookup and manual entry will display only records included in the user's organization security profile.

If you have multiple companies, OCI records are visible across all companies. Organizations can also be assigned across multiple companies.

When organization security is on, the application follows this logic:

- When the application launches an OCI record with an assigned organization, the record displays if at least one organization (as set up on the Org Links subtask) is included in the user's security profile.
- If no organization is assigned to the OCI record, all users that have access to this screen can view the OCI record.
- When you enter values on this screen, the lookup will display records with an organization included in the user's security profile, and manually entered values will be verified against the lookup.
- All hyperlinks will apply organization security in the launched application if that application has organization security enabled.

Detailed updates to the main screen and subtasks are listed in the following table.

Main Screen/Subtask	Field/UI Item	Updates
Main screen	**Prime Contract No, Project Number**	The lookup and manual entry will display records with an organization that matches an organization in the user's security profile.
Opportunities subtask	**Opportunity ID**	The lookup and manual entry will display opportunity records with an organization included in the user's organization security profile as well as records with no assigned organization. The hyperlink will launch the opportunity record only if the user has security rights to the Manage Opportunities screen and the opportunity organization is included in the user's security profile.
Projects subtask	**Project**	The lookup and manual entry will display project records with an organization included in the user's organization security profile. The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.

Main Screen/Subtask	Field/UI Item	Updates
Employees subtask	**Employee**	The lookup and manual entry will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed. The hyperlink will launch the employee record only if the user has security rights to the Manage Contract Management Employee Info screen and the employee organization is included in the user's security profile.
Activities subtask	**Activity Owner**	The lookup and manual entry will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Manage Opportunities (CTMOPP)

Manage Opportunities follows this logic when organization security is on:

- When the application launches an opportunity record with an assigned organization, the record displays when its organization is included in the user's security profile.
- If no organization is assigned to the opportunity, all users that have access to this screen can view the opportunity record.
- When you enter values on this screen, the lookup will display records with an organization included in the user's security profile, and manually entered values will be verified against the lookup.
- All hyperlinks will apply organization security in the launched application if that application has organization security enabled.

Other updates to the tabs and subtasks are listed in the following table.

Tab/Subtask	Field/UI Item	Updates
General tab	**Business Unit**	The lookup and manual entry will display business unit records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.
	Organization	A user can assign an organization to an opportunity record if that organization is part of the user's security profile. The lookup will also display only those records included in the user's security profile. If the user tries to manually enter an organization that is not a part of the user's security profile, Costpoint displays an error message when the user tabs out of the field.

Tab/Subtask	Field/UI Item	Updates
	Business Unit Lead	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
Status tab	**Completed By**	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
RFP Info	**Notify**	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
Team tab	**Employee / Employee ID** (Opportunity Employee Team and Potential Resource Details subtasks)	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed. The hyperlink will launch the employee record only if the user has security rights to the Manage Contract Management Employee Info screen and the employee organization is included in the user's security profile.
Assessments tab	**CP Assessor Name**	The lookup and manual entry will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
Contracts subtask	**Contract ID, Contract Name**	This subtask will display contract records linked to the opportunity with an organization that is included in the user's organization security profile. If no organization is assigned to the contracts, those contracts will also display here. The hyperlink in **Contract ID** will launch the contract record only if the user has security rights to the Manage Contracts screen and the contract organization is included in the user's security profile.

Tab/Subtask	Field/UI Item	Updates
Subcontracts subtask	**Subcontract ID**	The hyperlink will launch the subcontract record only if the user has security rights to the Manage Subcontracts screen and the subcontract organization is included in the user's security profile.
Organizational Conflict of Interest (OCI) Records subtask	**OCI ID**	The hyperlink will launch the OCI record only if the user has security rights to the Manage Organizational Conflict of Interest (OCI) screen and the OCI organization is included in the user's security profile.
Projects Linked subtask	**Project Link**	The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.
	Printing Project Reports	The reports will print only if the project organization is included in the user's security profile.
Project Initialization subtask	**Template Project, Destination Project**	The lookup and manual entry will display project records with an organization included in the user's organization security profile.
	Owning Organization (Details subtask)	A user can assign an organization to a project row if that organization is a part of the user's security profile.
GovWin IQ subtask	**GovWin IQ ID, Employee ID, First Name, Last Name**	The lookup and manual entry will display records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
Activities subtask	General rule	If the opportunity organization ID is provided, the Activities subtask will display activity records related to the main record regardless of the organization assignment of the **Activity Owner**, **Contract ID**, and **Subcontract ID**. If the opportunity organization is null, the Activities subtask will display all activity records related to the main record if at least the **Activity Owner**, **Contract ID**, or **Subcontract ID** matches the user's organization security profile.
	Activity Owner	The lookup will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Tab/Subtask	Field/UI Item	Updates
	Opportunity ID, Contract ID, Subcontract ID	The lookup will display opportunity, contract, or subcontract records with an organization included in the user's organization security profile as well as records with no assigned organization. Hyperlinks that display on this subtask will launch the record only if the user has rights to the specific application and the record's organization is included in the user's security profile.
	Resource ID if **Resource Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Task Owner ID if **Owner Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Print Opportunity Current Pipeline Report (OPRCPL)

The **Start** and **End** field lookup and manual entry for **Business Unit Lead** will display employee records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.

For opportunity records with an assigned organization, only those records with an organization included in the user's security profile will be printed on the report when organization security is enabled.

Opportunity records with no assigned organization will display on the report for all users who have access to this application.

Print Opportunity Days Open Report (OPROPN)

The **Start** and **End** field lookup for **Opportunity Name** will display opportunity records with an organization that matches an organization in the user's security profile as well as records with no assigned organization.

For opportunity records with an assigned organization, only those records with an organization included in the user's security profile will be printed on the report when organization security is enabled.

Opportunity records with no assigned organization will display on the report for all users who have access to this application.

Print Opportunity Win Loss Report (OPRWLS)

For opportunity records with an assigned organization, only those records with an organization included in the user's security profile will be printed on the report when organization security is enabled.

Opportunity records with no assigned organization will display on the report for all users who have access to this application.

Manage Contract Management Customer Info (CTMCUST)

No organization security will be applied when you launch records on this screen. For hyperlinks, organization security will be applied to the launched application if that application has organization security enabled.

Detailed changes to the tab and subtasks are listed in the following table.

Tab/Subtask	Field/UI Item	Updates
Performance Assessment tab	**Contract Name**	The hyperlink will launch the contract record only if the user has security rights to the Manage Contracts screen and the contract organization is included in the user's security profile.
	Contractor Representative Name	The hyperlink will launch the employee record only if the user has security rights to the Manage Contract Management Employee Info screen and the employee organization is included in the user's security profile.
	Project ID	The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.
Activities subtask	**Activity Owner**	The lookup will display employee records with an organization included in the user's organization security profile and employee status of **Active**. If no organization is assigned to the records, the records will not be displayed.
	Opportunity ID, Contract ID, Subcontract ID	The lookup will display opportunity, contract, or subcontract records with an organization included in the user's organization security profile as well as records with no assigned organization. Hyperlinks that display on this subtask will launch the record only if the user has rights to the specific application and the record's organization is included in the user's security profile.
	Resource ID if **Resource Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Task Owner ID if **Owner Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Manage Contract Management Employee Info (CTMEMPL)

No organization security will be applied when you launch records on this screen. For hyperlinks, organization security will be applied to the launched application if that application has organization security enabled.

Detailed changes to the main screen and subtasks are listed in the following table.

Main Screen/Subtask	Field/UI Item	Updates
Main screen	**Employee**	The hyperlink will launch the employee record only if the user has security rights to the Manage Employee Information screen and the employee organization is included in the user's security profile.
Opportunities subtask	**Opportunity ID**	The hyperlink will launch the opportunity record only if the user has security rights to the Manage Opportunities screen and the employee organization is included in the user's security profile.
	Project	The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the employee organization is included in the user's security profile.
Contracts subtask	**Contract Name**	The hyperlink will launch the contract record only if the user has security rights to the Manage Contracts screen and the employee organization is included in the user's security profile.
	Project	The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the employee organization is included in the user's security profile.

Manage Leads and Contacts (CTMLEAD)

Manage Leads and Contacts follows this logic when organization security is on:

- When launching a record, Costpoint displays only those records with an **Owner ID** organization that matches an organization in the user's security profile.
- If no organization is assigned to the **Owner ID**, users will not see the lead/contact record.
- When you enter values on this screen, the lookup will display records with an organization included in the user's security profile, and manually entered values will be verified against the lookup.
- All hyperlinks will apply organization security in the launched application if that application has organization security enabled.

The following table lists specific updates made to the subtasks of this screen.

Subtask	Field/UI Item	Updates
Related Leads / Contacts subtask	**Associated Lead/Contact ID**	The lookup and manual entry will display records with an organization that matches an organization in the user's security profile. If no organization is assigned to the records, the records will not be displayed.
Opportunities subtask	**Opportunity ID, Opportunity Name**	The hyperlink will launch the opportunity record only if the user has security rights to the Manage Opportunities screen and the opportunity organization is included in the user's security profile.
Contracts subtask	**Contract ID, Contract Name**	The hyperlink will launch the contract record only if the user has security rights to the Manage Contracts screen and the contract organization is included in the user's security profile.
Activities subtask	**Activity Owner**	The lookup will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Opportunity ID, Contract ID, Subcontract ID	The lookup will display opportunity, contract, or subcontract records with an organization included in the user's organization security profile as well as records with no assigned organization. Hyperlinks that display on this subtask will launch the record only if the user has rights to the specific application and the record's organization is included in the user's security profile.
	Resource ID if **Resource Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Task Owner ID if **Owner Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Manage Contract Management Vendor Info (CTMVEND)

No organization security will be applied when you launch records on this screen. For hyperlinks, organization security will be applied to the launched application if that application has organization security enabled.

The following table lists the updates made to the tab and subtasks of this screen.

Tab/Subtask	Field/UI Item	Updates
Supplier/Vendor Rating tab	**Project ID**	The hyperlink will launch the project record only if the user has security rights to the Manage Project User Flow screen and the project organization is included in the user's security profile.
	Contract ID	The hyperlink will launch the contract record only if the user has security rights to the Manage Contracts screen and the contract organization is included in the user's security profile.
	Subcontract ID	The hyperlink will launch the subcontract record only if the user has security rights to the Manage Subcontracts screen and the subcontract organization is included in the user's security profile.
Activities subtask	**Activity Owner**	The lookup will display employee records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Opportunity ID, Contract ID, Subcontract ID	The lookup will display opportunity, contract, or subcontract records with an organization included in the user's organization security profile as well as records with no assigned organization. Hyperlinks that display on this subtask will launch the record only if the user has rights to the specific application and the record's organization is included in the user's security profile.
	Resource ID if **Resource Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.
	Task Owner ID if **Owner Type** = **Employee** or **Lead** (Resources subtask)	The lookup and manual entry will display employee/lead records with an organization included in the user's organization security profile. If no organization is assigned to the records, the records will not be displayed.

Performance Assessment for Contracts

Costpoint 8.2 allows you to document and manage performance assessments related to contracts. Assessments may include contractor evaluations based on various factors such as quality of product or service, schedule, cost control, management, and regulatory compliance. Costpoint provides you with system-defined assessment factors and allows you to add your own assessment criteria. You can rate these factors using predefined rating codes (that range from **Unsatisfactory** to **Exceptional**), but you can also customize your ratings depending on your assessment requirements.

You can include assessment reports, such as those from the Contractor Performance Assessment Report System (CPARS), as well as non-regulated assessments. You can have multiple assessment records for a single contract, and Costpoint averages all the assessment ratings for this contract.

This feature also allows you to view all assessment records related to a customer in a single location. A customer can be linked to multiple assessment records, and Costpoint provides the average rating of all assessment records for a selected customer.

Three new applications have been created and two other screens have been updated for this enhancement.

To set up contract performance assessment:

1. Review Costpoint-defined performance assessment descriptions on the Manage Performance Assessment Descriptions screen, or create your own assessment factors.
2. Review system-defined performance rating codes, or create your own rating codes and specify their corresponding scores (ranging from 0 to 10) on the Manage Performance Rating Codes screen.
3. Assign assessment descriptions to system-defined or new assessment formats on the Manage Performance Assessment Formats screen.
4. Access the Performance Assessment tab on the Manage Contracts screen.
5. Populate this tab with all the required information, including the project, customer, and contractor representative related to the contract assessment, as well as the assessment format you would like to use for the assessment record.

   Once you enter an assessment format, the system populates the Assessment Details subtask with assessment factors/descriptions assigned to the selected assessment format.
6. On the Assessment Details subtask, rate each assessment factor by selecting a rating code.

   The score (ranging from 0 to 10) corresponding to the rating code selected automatically displays. The system also calculates and displays the total score as well as the percentage out of the highest possible score.

Manage Performance Assessment Descriptions (CTMCADC)

Use this new screen to view, enter, and maintain assessment descriptions that you can use to evaluate contract performance.

There are six system-defined assessment codes and descriptions, but you can also add your own assessment factors. Each description describes an assessment factor that can help you evaluate your contracts better. Costpoint-defined assessment codes and descriptions include the following:

Assessment Code	Assessment Description
RTDESC_01	Quality of Product or Service
RTDESC_02	Cost Control
RTDESC_03	Schedule/Timeliness
RTDESC_04	Management or Business Relations
RTDESC_05	Small Business Subcontracting

Assessment Code	Assessment Description
RTDESC_06	Regulatory

Performance assessment descriptions that exist on this screen can be assigned to assessment formats on the Manage Performance Assessment Formats screen if their corresponding **Show in Lookup** checkbox is selected.

You cannot delete system-defined assessment codes. You can delete user-defined codes only if the format to which it is assigned has not been used in a contract assessment. Similarly, system- and user-defined descriptions can be modified only if the format associated with them has not yet been used in any contract assessment.

To access this new application, click **CRM & Contracts » Contract Management Controls » Contracts/Subcontracts Controls » Manage Performance Assessment Descriptions**.

Manage Performance Rating Codes (CTMCART)

Use this screen to view, define, and track rating codes that you can use in performance assessments related to contracts. These ratings define how well the performance meets the contract's requirements in different areas, such as quality of product or service, schedule, cost control, management, regulatory compliance, and other assessment factors defined in Manage Performance Assessment Descriptions.

Six system-defined rating codes automatically display on this screen together with their corresponding description and assigned score.

Rating Code	Rating Code Description	Score
EXCP	Exceptional	10
VGOOD	Very Good	8
SATIS	Satisfactory	6
MARG	Marginal	4
UNSAT	Unsatisfactory	2
NA	Not Applicable	0

You can also create your own ratings. The code and description must be unique, and the score should range from 0 to 10.

You can use the ratings defined on this screen on the Assessment Details subtask of the Performance Assessment tab in Manage Contracts if their corresponding **Show in Lookup** checkbox is selected.

You cannot delete system-defined rating codes. You can delete user-defined codes only if they have not been used in a contract assessment. Similarly, system- and user-defined descriptions and scores can be modified only if the rating code has not yet been used in any contract assessment. When you modify the description, Costpoint displays a warning message informing you that changing the description may impact the meaning of existing performance assessments. You can click **Ok** to proceed with your changes, or click **Cancel** to retain the current description.

To access this new application, click **CRM & Contracts » Contract Management Controls » Contracts/Subcontracts Controls » Manage Performance Rating Codes**.

Manage Performance Assessment Formats (CTMCAFRM)

After you have established your assessment descriptions, you can assign them to assessment formats on the new Manage Performance Assessment Formats screen. One system-defined format (**STANDARD**) automatically displays on this screen, but you can also create new formats.

You must assign at least one assessment description to a format before you can save the format. You can assign up to 10 assessment descriptions per format.

Costpoint automatically calculates the **Max Score** for the assessment format, depending on the number of assessment descriptions assigned. Each assessment description accounts for a maximum score of 10. For example, if you assigned all 10 assessment descriptions, the maximum score for the assessment format is 100. If you assigned only 6 assessment descriptions, the maximum score for the format is 60.

Any assessment formats that have the **Show in Lookup** checkbox selected on this screen will be available in the lookup of the **Assessment Format** field on the Performance Assessment tab in Manage Contracts.

You can open this new screen by clicking **CRM & Contracts » Contract Management Controls » Contracts/Subcontracts Controls » Manage Performance Assessment Formats**.

Manage Contracts (CTMCNTR)

After you have reviewed or defined performance assessment descriptions, rating codes, and formats, you can enter performance assessment details on the new Performance Assessment tab on the Manage Contracts screen. On this tab, you can indicate the project, customer, contractor representative, assessor, and reviewer associated with the contract assessment. You can also specify the review date, assessment type, and status of the assessment record.

If a default assessment format is marked on the Manage Performance Assessment Formats screen, that format automatically displays for new records on the Performance Assessment tab, but you can change it. Once you select an assessment format, assessment factors or descriptions assigned to that format will display on the Assessment Details subtask of this tab.

On that subtask, you can evaluate each assessment factor by selecting a rating. Ratings may range from **Not Applicable** or **Unsatisfactory** to **Exceptional**. Each rating has an equivalent score ranging from 0 to 10, which displays on the **Score** column. Costpoint calculates the total score for the assessment record and displays this value on the Assessment Details subtask as well as on the Performance Assessment tab.

You can enter multiple assessment records for a single contract. Costpoint displays the average rating (in percentage) of all performance assessments for the contract in the new **Average Rating** field added to the header of the Manage Contracts screen.

Manage Contract Management Customer Info (CTMCUST)

On this screen, a new Performance Assessment tab and Assessment Details subtask are now available. On these read-only tab and subtask, you can view all contract performance assessment records related to the customer you are currently accessing. Both the tab and subtask are visible only to regular customers and are hidden for prospective customers.

Information on the new tab and subtask comes from the Performance Assessment tab and Assessment Details subtask of the Manage Contracts screen. A customer is associated with a contract performance assessment record if that customer is selected in the following fields in Manage Contracts:

- **Customer ID**
- **Assessor**

- **Reviewer**

A customer can be associated with multiple performance assessment records. A new **Average Rating** field has been added to the header of Manage Contract Management Customer Info to display the average rating (in percentage) of all performance assessments linked to the customer. This new field is visible only to regular customers and hidden for prospective customers.

Updated Vendor Exclusion Notification Message

Costpoint has updated the exclusion notification message that displays on the following screens when you associate a record with a vendor that is on the System for Award Management (SAM.gov) exclusion list, or with a vendor employee who is linked to a vendor included in the exclusion list:

- Manage Opportunities
- Manage Contracts
- Manage Subcontracts

The exclusion notification message now provides more details about the exclusion, including the vendor ID, type of exclusion, active and termination dates of the exclusion, as well as the date the exclusion was last updated. The last updated date is the **Last GovWin IQ Synch** date on the Manage Vendors screen.

De-Supported: Opportunities Quick View (CTMOPPM)

The Opportunities Quick View application has been de-supported in Costpoint 8.2. You can continue to add, manage, and track opportunity information through the Manage Opportunities screen.

Planning

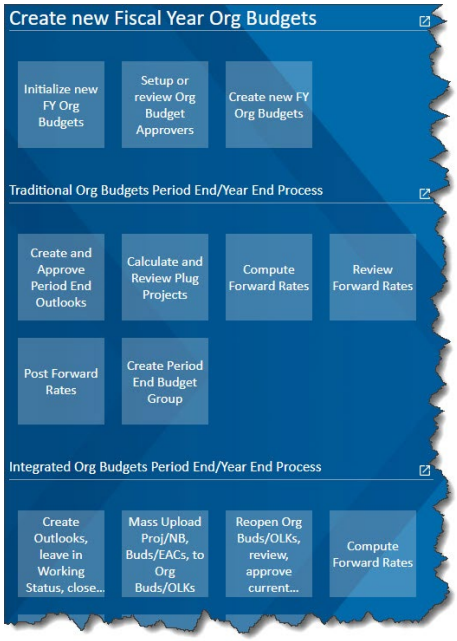
This section describes Costpoint 8.2 enhancements for the Planning domain.

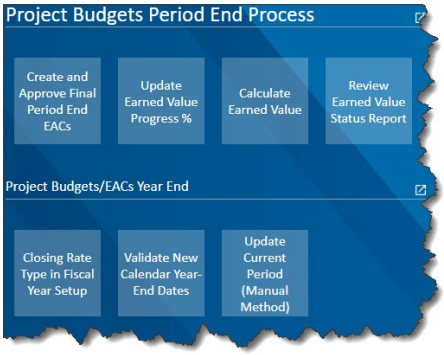
Streamlined Workflows with Flyout Navigation Banners

To help eliminate the need to remember complex processes and to make it easier to navigate a workflow, Costpoint provides you the option to use a navigation fly-out banner as a guide from **My Menu**.

The navigation banner, which displays at the top of an application screen, is made of application links displayed in the order of a process flow.

This feature provides users who are assigned the Org Budget Processes (DEFAULT_ORG_MGR) or the Project Budget Processes (DEFAULT_PROJECT_MGR) UI profiles multiple navigation banners for different workflows. For example:





You can access **My Menu** by selecting the User Preferences drop-down list in the upper-right portion of your screen. Provided that you have authorization, you can modify your **My Menu** settings in Configure User Preferences where navigation banners can be copied and edited for customization, or you can set up your own workflow.

Org Budget Process Navigation Banner

The following are navigation banners for the Org Budget Processes user profile:

Group Header	My Menu Title	Screen
Create new Fiscal Year Org Budgets	Initialize new FY Org Budgets	Organization Budget Cycle Initialization

Group Header	My Menu Title	Screen
	Setup or review Org Budget Approvers	Maintain Org Budget Approvers
	Create new FY Org Budgets	Organization Budgets/Outlooks
Traditional Org Budgets Period End/Year End Process	Create and Approve Period End Outlooks	Organization Budgets/Outlooks
	Calculate and Review Plug Projects	Plug Project Review
	Compute Forward Rates	Compute Forward Rates
	Review Forward Rates	Rate Analysis Summary
	Post Forward Rates	Post Forward Rates to Budget
	Create Period End Budget Group	Maintain Budget Groups
Integrated Org Budgets Period End/Year End Process	Create Outlooks, leave in Working Status, close application	Organization Budgets/Outlooks
	Mass Upload Proj/NB, Buds/EACs, to Org Buds/OLKs	Mass Upload Project Budgets to Org Budgets
	Reopen Org Buds/OLKs, review, approve current Buds/OLKs	Organization Budgets/Outlooks
	Compute Forward Rates	Compute Forward Rates
	Review Forward Rates	Rate Analysis Summary
	Post Forward Rates	Post Forward Rates to Budget
	Create Period End Budget Group	Maintain Budget Groups

Project Budget Processes Navigation Banner

The following are navigation banners for the Project Budget Processes user profile:

Group Header	My Menu Title	Screen
Project Budgets Period End Process	Create and Approve Final Period End EACs	Project Budgets/EACs
	Update Earned Value Progress %	Update Project Progress %
	Calculate Earned Value	Calculate Earned Value

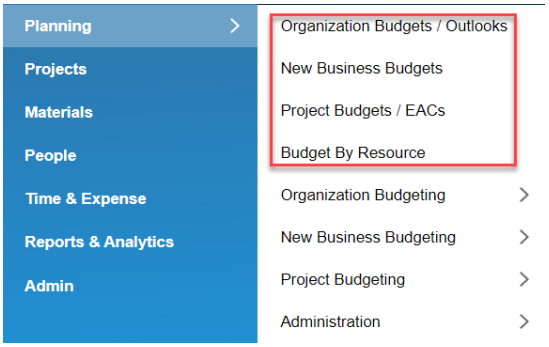
Group Header	My Menu Title	Screen
	Review Earned Value Status Report	Earned Value Status Report
Project Budgets/EACs Year End	Closing Rate Type in Fiscal Year Setup	Fiscal Year Setup
	Validate New Calendar Year-End Dates	Maintain Fiscal Year Periods
	Update Current Period (Manual Method)	Maintain Current Period

Planning Menu Streamlined

To streamline navigation and improve ease of access, several commonly used applications now display at the top level of the Planning menu. Affected applications include:

- Organization Budgets/Outlooks
- New Business Budgets
- Project Budgets/EACs
- Budget by Resource.

When you select the Planning Domain from the left navigation pane, these applications now display above the module menus:



Since the applications are available at the top level, they are no longer accessible from module menus.

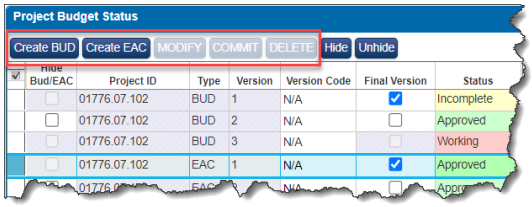
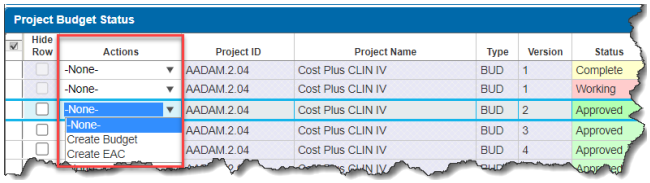
Interface Updates to Project Budgets/EACs

The Project Budgets/EACs application interface was updated as follows:

- Budget action buttons were converted to items on a new **Actions** drop-down list.
- Subtasks for budgeting labor and expenses were consolidated under two new subtasks.
- The Project Labor Categories subtask includes new subtask tables for resource billing rates.

Budget Action Buttons Converted to List Items

An **Actions** drop-down list, which replaces the budget action buttons (Modify and Commit, for example), was added to the **Project Budget Status** section of the Project Budgets/EACs application.

Version 8.1 Buttons	Version 8.2 Actions Drop-Down List
 *Buttons were enabled/disabled based on budget status.*	 *List options display or are hidden based on budget status.*

The budget actions that are available vary based on budget status. In earlier versions, this was accommodated by the button either being enabled or disabled. In version 8.2, the drop-down list only displays actions that are valid for the currently selected budget.

Options on the **Actions** drop-down list and other related actions, such as marking a budget as complete, follow all the same rules as in earlier versions. The table below is provided as a reminder of which options are valid per budget status, as well as whether the **Approved** or **Complete** checkbox is editable:

Budget Status	Primary Budget Option	Other Valid Options
Working	Commit	Delete
Incomplete	Modify	Delete
Complete	Modify	Delete
Approved	Create Budget or Create EAC	Delete

Note: Other standard system behaviors related to the status of a budget are unchanged. For example:

- If a Working status budget is yellow, it is not editable.
- If the budget has a status of Incomplete, the **Complete** checkbox is editable.
- If a budget has a status of Complete, the **Approved** checkbox is editable.
- If you are not the owner of the budget, all options on the **Actions** drop-down list are hidden.

Budget Subtasks Consolidated

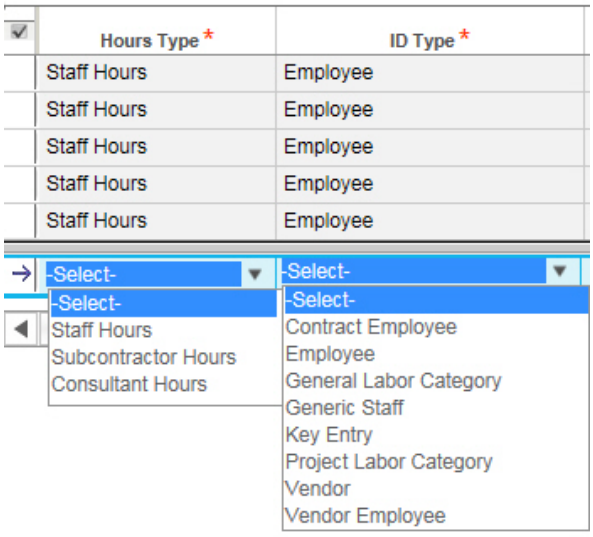
To simplify entry of budget details, multiple subtasks were consolidated under two new subtasks: Hours and Amounts.

The table below shows which subtasks were consolidated.

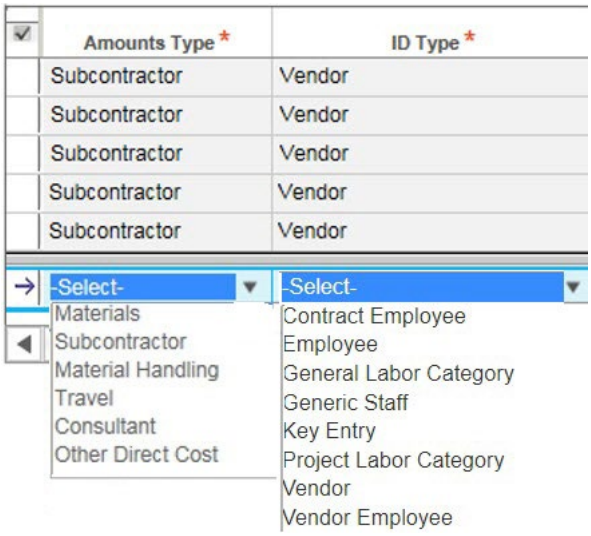
New Subtask	Subtasks Consolidated
Hours	▪ Staff Hours ▪ Subcontractor Hours ▪ Consultant Hours
Amounts	▪ Materials ▪ Subcontractor ▪ Material Handling ▪ Travel ▪ Consultant ▪ Other

The consolidated subtasks, shown in the second column above, now display as drop-down list items on the new subtasks in the first column. For example:

Hours Subtask Table



Amounts Subtask Table



In the first column of either subtask, first select a category (formerly a subtask) for the hours or amount you want to budget, and then from **ID Type**, select the specific type.

> **Note:** The images above display all possible values for reference only. After you select a value from **Hours Type** or **Amounts Type**, the **ID** Type, only values relevant for that option display.

Lookup values for all other columns in the table (such as, Name, Acct ID, Org ID) also filter based on the values you select in the first two columns. For example:

Hours Type *	ID Type *	ID *	Name *	Acct ID *	Org ID *	GLC/PLC	Hr Rate	Rev	Brd	12/31/06
Staff Hours	Employee	1093	Adkins, Steve	50-100-20	10.10.2.3	HEFM	0.00	☑	☑	0.00
Staff Hours	Employee	1072	Barnes, Victor	50-100-10	10.10.2.3	HEFM	0.00	☑	☑	0.00

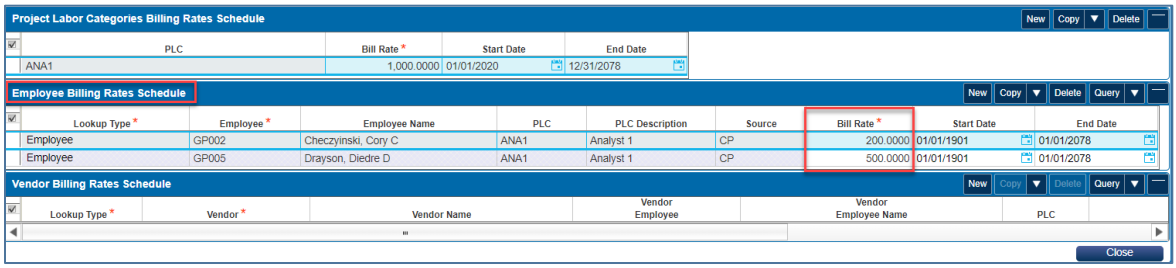
Project Labor Categories Subtask Enhancement

The Project Labor Categories subtask includes two new billing rate schedule subtasks that display unique rates assigned to specific employees, vendors, or vendor employees. The new subtasks are:

- **Employee Billing Rates Schedule**: Options include regular employees and contract employees.
- **Vendor Billing Rates Schedule**: Options include vendors and vendor employees.

While these rates were previously used in revenue calculations within Planning, they did not display in Project Labor Categories. The new subtasks read the PLC rate tables in the Projects domain, so if rates exist there, and if the project is sequenced to level, the rates now display on the respective subtasks.

In the following image, for example, the bill rates display because the project is configured for the sequence level associated with the PEC (Project/Employee PLC Rates) table in the Projects Domain.



> **Note:** Records that populate from Costpoint are editable and records can be added or deleted.

For additional information on subtask fields, see the online help.

General Enhancements to Project Budgeting

Features described in this section affect Project Budgeting, New Business Budgeting, and Administration.

New Column for Describing Budget Cost Amounts

An **Explanation** column was added to the Amounts budget entry subtask in the following applications:

- Project Budgets/EACs
- New Business Budgets

Use the **Explanation** column to enter a description, purpose, or general explanation of the associated cost for any option selected from the **Amounts Type** list, such as Travel, Materials, Vendor, and so on.

Explanation Column Added to Reports

The **Explanation** column was added to various Project Budgeting and New Business Budgeting reports, including the following:

- Project Budgeting » Active Level Reports

- Raw Cost Breakdown
- Burdened Cost Breakdown
- Revenue Breakdown
- Revenue Analysis

- New Business Budgeting » Reports/Inquiries
  - Multi-New Business Budget Consolidation (Revenue/Cost)
  - New Business Budget Summary (Revenue/Cost)
  - Structured New Business Budget Summary (Revenue/Cost)

Related Changes for Business Intelligence Reporting

The Report Table Update Process application (**Administration » Administration Utilities**) was also updated so that the **Explanation** field is also available to users of Business Intelligence.

New Project Security Application

A new Manage Project Org Based Security application (**Administration » Administration Controls**) was added that simplifies project budget security by enabling you to control it at the project level per user.

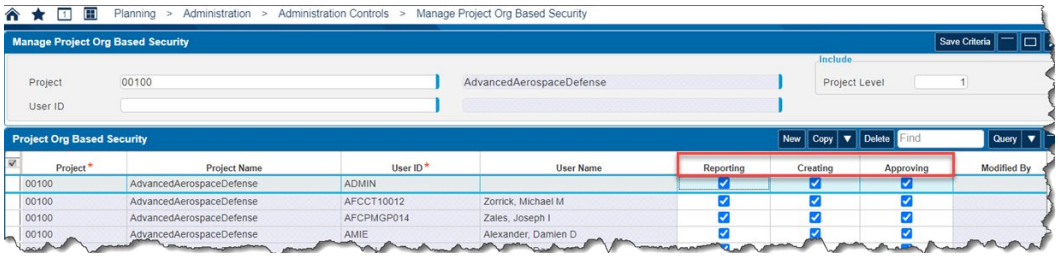
The Role of Global Security

Depending on how global security of Planning is configured, you can modify rights for reporting and budget creation and approval, or you can modify reporting rights only.

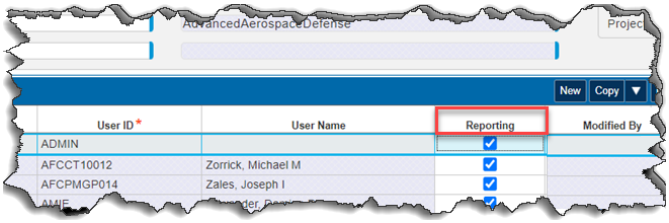
Global security for Planning is based on the option selected from the **Project Security to be based on** setting that is located on the Projects tab of the Configuration Settings Screen (**Administration » Administration Controls**).

When this setting is selected as **Org ID**, you can modify all available rights from the new screen, but if it is selected as **Project Budget Security**, the new screen allows you to modify reporting rights only.

For example, when security is based on **Org ID**, the Manage Project Org Based Security application displays all three rights options as shown in the example below:



If it is based on Project Budget Security, it displays only the Reporting option:



Rights Modification

After you select an ID from **Project** and click , the table populates with all available users. To modify rights for a specific user instead, select the ID from **User ID** in the header.

Users are granted access to all projects that fall under their Security Org ID, as designated in User Maintenance (**Planning » Administration » System Security**), as well as rights added in Manage Security Org Rights (previously named Manage Project Manager Matrix rights).

The checkboxes default to selected, which grants the right by default. To remove a right for a selected user, clear the checkbox. For additional information, see the online Help for this screen.

Other Security Application Changes

The following changes were made to other project security applications.

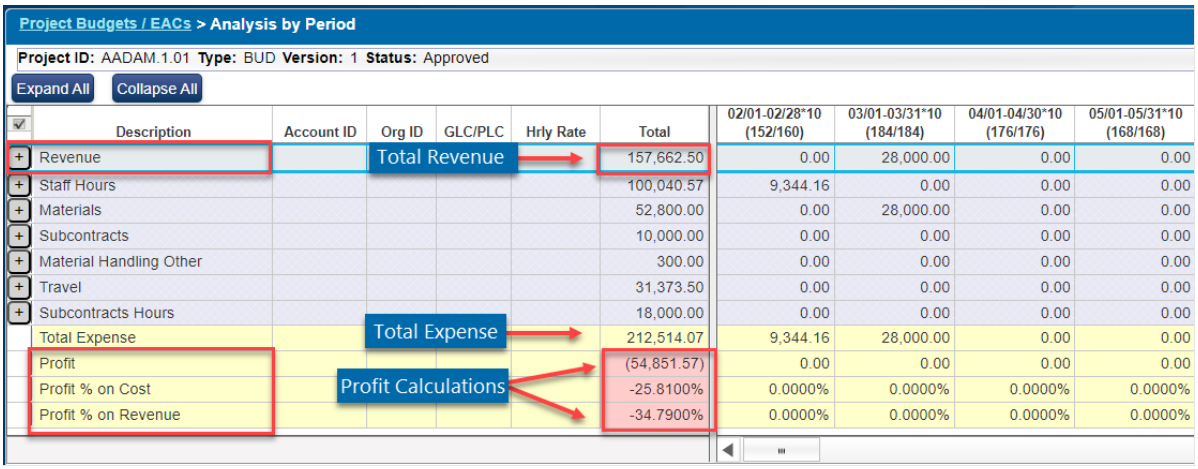
Menu Path	Application	Action
Planning » Project Budgeting » Controls and Utilities	Manage Project Level Reporting for Users	Removed
	Delete Project Level Reporting for Users	Removed
Planning » Administration » Administration Controls	Manage Project Manager Matrix Rights	Renamed to Manage Security Org Rights

Revenue Amounts Added to Project Budgets by Period

In Project Budgets/EACs (**Planning » Project Budgets/EACs**), the Analysis by Period subtask (formerly named Burdened Cost) now includes revenue amounts as well as cost amounts, which enables Planning to calculate profit and profit % amounts.

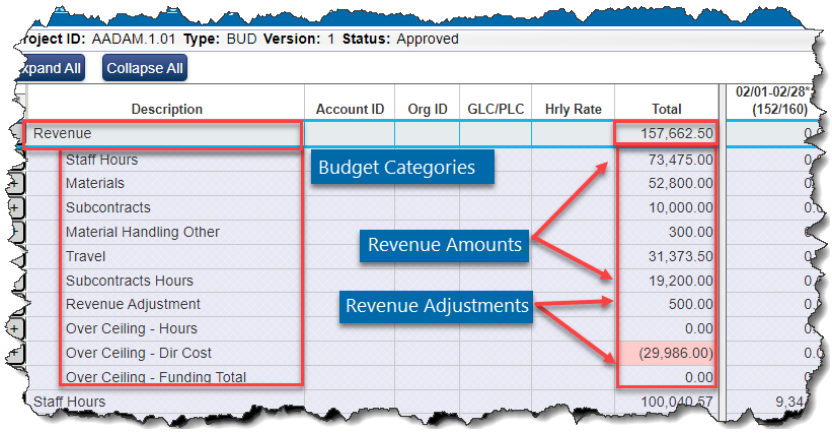
The inclusion of revenue along with raw and burdened cost amounts, and the subsequent profit calculations, provides a more complete analysis of budget performance per period.

Revenue is totaled at the top of the report and expense is totaled at the bottom, directly above profit:



Description	Account ID	Org ID	GLC/PLC	Hrly Rate	Total	02/01-02/28*10 (152/160)	03/01-03/31*10 (184/184)	04/01-04/30*10 (176/176)	05/01-05/31*10 (168/168)
Revenue					157,662.50	0.00	28,000.00	0.00	0.00
Staff Hours					100,040.57	9,344.16	0.00	0.00	0.00
Materials					52,800.00	0.00	28,000.00	0.00	0.00
Subcontracts					10,000.00	0.00	0.00	0.00	0.00
Material Handling Other					300.00	0.00	0.00	0.00	0.00
Travel					31,373.50	0.00	0.00	0.00	0.00
Subcontracts Hours					18,000.00	0.00	0.00	0.00	0.00
Total Expense					212,514.07	9,344.16	28,000.00	0.00	0.00
Profit					(54,851.57)	0.00	0.00	0.00	0.00
Profit % on Cost					-25.8100%	0.0000%	0.0000%	0.0000%	0.0000%
Profit % on Revenue					-34.7900%	0.0000%	0.0000%	0.0000%	0.0000%

Revenue can be expanded to display the revenue totals per budget category, as well as any adjustments:



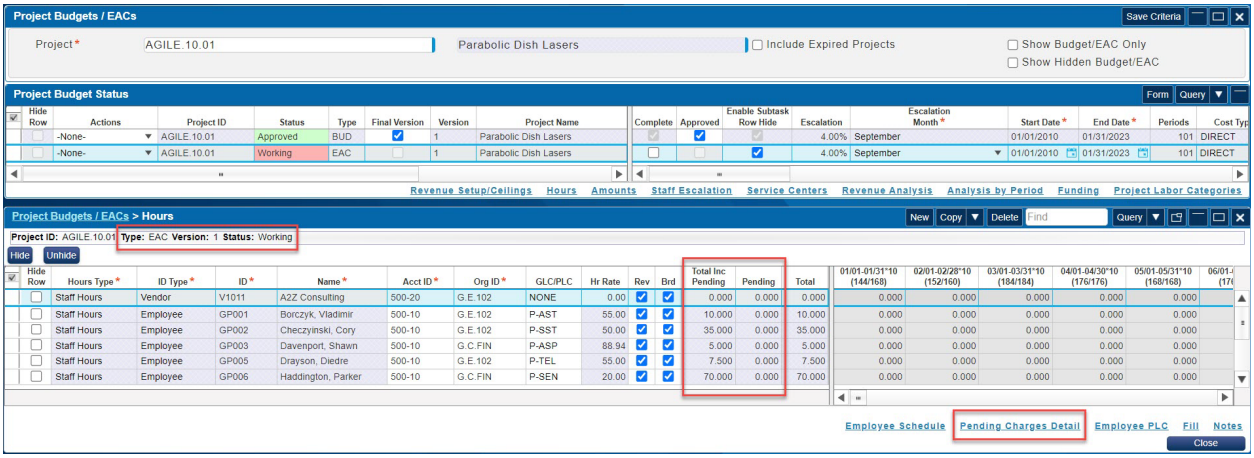
New Columns and Subtask for Tracking Pending Costs

The Hours and Amounts subtasks of the Project Budgets/EACs screen (**Planning » Project Budgets/EACs**) were updated to include two new columns and a subtask to account for pending charges.

> **Note:** The new columns and subtask display only on EACs, not budgets, and details will populate only if the EAC has a status of Working.

Pending Charges Columns

The **Total Inc Pending** and **Pending** columns enable you to clearly identify and keep track of pending charges for a more accurate cost forecasting.

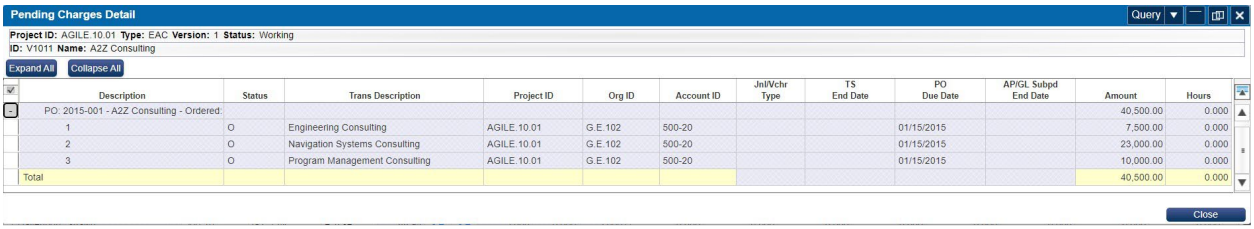


The following table describes the pending charges columns.

Column	Description
Total Inc Pending	This column displays the total EAC amount plus the current pending charges.
Pending	This column displays the pending charges.

Pending Charges Detail Subtask

The Pending Charges Detail subtask links directly to the pending charges report.

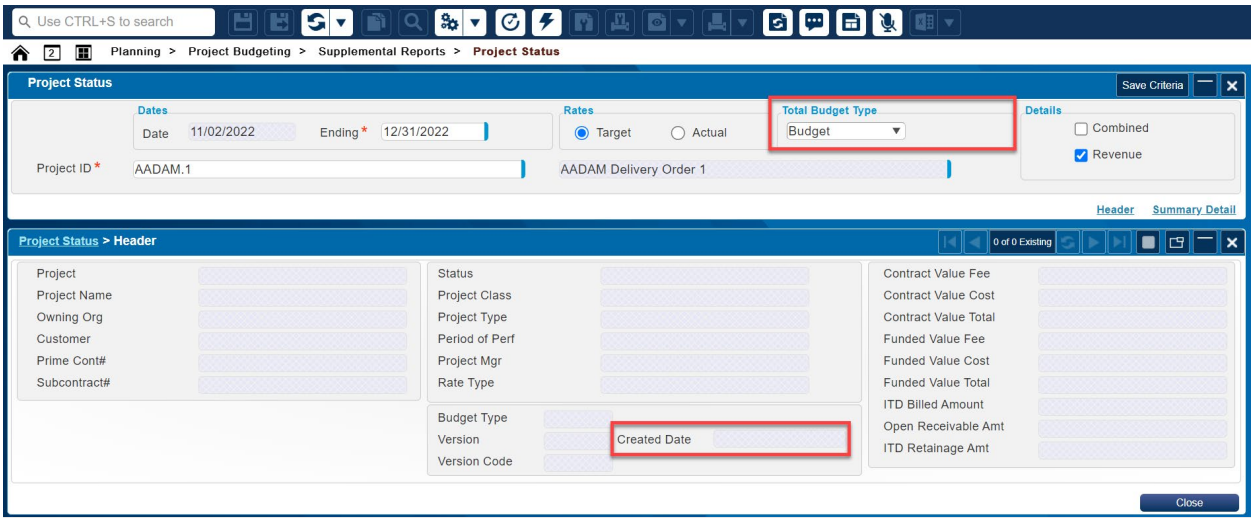


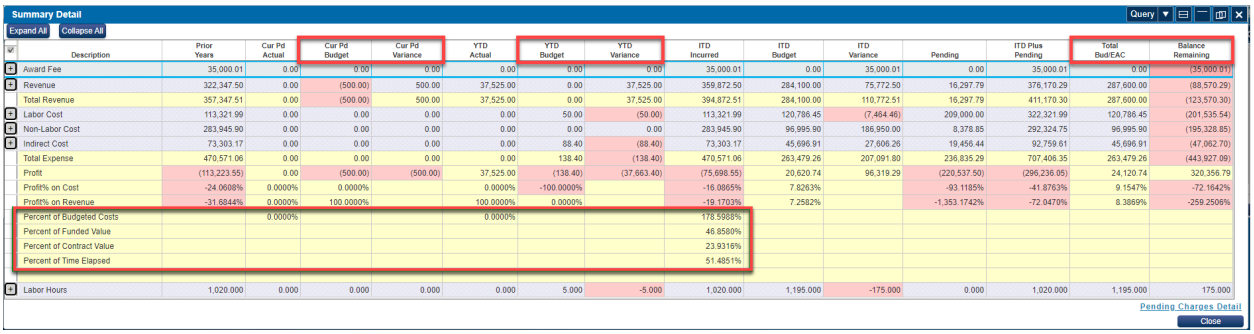
Description	Status	Trans Description	Project ID	Org ID	Account ID	Jnl/Vchr Type	TS End Date	PO Due Date	AP/GL Subpd End Date	Amount	Hours
PO: 2015-001 - A2Z Consulting - Ordered:										40,500.00	0.000
1	O	Engineering Consulting	AGILE.10.01	G.E.102	500-20			01/15/2015		7,500.00	0.000
2	O	Navigation Systems Consulting	AGILE.10.01	G.E.102	500-20			01/15/2015		23,000.00	0.000
3	O	Program Management Consulting	AGILE.10.01	G.E.102	500-20			01/15/2015		10,000.00	0.000
Total										40,500.00	0.000

Enhanced Project Status Report

The Project Status report (**Project Budgeting » Supplemental Reports**) was updated to include additional information relevant to project budgets, variances, and cost percentages.

The red boxes in the following images indicate the screen updates.





Description	Prior Years	Cur Pd Actual	Cur Pd Budget	Cur Pd Variance	YTD Actual	YTD Budget	YTD Variance	ITD Incurred	ITD Budget	ITD Variance	Pending	ITD Plus Pending	Total Bud/EAC	Balance Remaining
Award Fee	35,000.01	0.00	0.00	0.00	0.00	0.00	0.00	35,000.01	0.00	35,000.01	0.00	35,000.01	0.00	(35,000.01)
Revenue	322,347.50	0.00	(500.00)	500.00	37,525.00	0.00	37,525.00	359,872.50	284,100.00	75,772.50	16,297.79	376,170.29	287,600.00	(88,570.29)
Total Revenue	357,347.51	0.00	(500.00)	500.00	37,525.00	0.00	37,525.00	394,872.51	284,100.00	110,772.51	16,297.79	411,170.30	287,600.00	(123,570.30)
Labor Cost	113,321.99	0.00	0.00	0.00	0.00	50.00	(50.00)	113,321.99	120,786.45	(7,464.46)	209,000.00	322,321.99	120,786.45	(201,535.54)
Non-Labor Cost	283,945.90	0.00	0.00	0.00	0.00	0.00	0.00	283,945.90	96,995.90	186,950.00	8,378.85	292,324.75	96,995.90	(195,328.85)
Indirect Cost	73,303.17	0.00	0.00	0.00	0.00	88.40	(88.40)	73,303.17	45,696.91	27,606.26	19,456.44	92,759.61	45,696.91	(47,062.70)
Total Expense	470,571.06	0.00	0.00	0.00	0.00	138.40	(138.40)	470,571.06	263,479.26	207,091.80	236,835.29	707,406.35	263,479.26	(443,927.09)
Profit	(113,223.55)	0.00	(500.00)	(500.00)	37,525.00	(138.40)	(37,663.40)	(75,698.55)	20,620.74	96,319.29	(220,537.50)	(296,236.05)	24,120.74	320,356.79
Profit% on Cost	-24.0608%	0.0000%	0.0000%		0.0000%	-100.0000%		-16.0865%	7.8263%		-93.1185%	-41.8763%	9.1547%	-72.1642%
Profit% on Revenue	-31.6844%	0.0000%	100.0000%		100.0000%	0.0000%		-19.1703%	7.2582%		-1,353.1742%	-72.0470%	8.3869%	-259.2506%
Percent of Budgeted Costs		0.0000%			0.0000%			178.5988%						
Percent of Funded Value								46.8580%						
Percent of Contract Value								23.9316%						
Percent of Time Elapsed								51.4851%						
Labor Hours	1,020.000	0.000	0.000	0.000	0.000	5.000	-5.000	1,020.000	1,195.000	-175.000	0.000	1,020.000	1,195.000	175.000

The following table describes the screen updates.

Screen	Update
Top	The **Budget Type** field was changed to **Total Budget Type**. The option you select in this field, either **Budget** or **EAC**, controls the value that displays in the **Total Bud/EAC** column.

Screen	Update
Header	A **Created Date** field was added. This non-editable field reflects the actual date on which the budget or the EAC was created.

Summary Detail	The following columns were added:
	▪ **Cur Pd Budget**: This column displays the budgeted amounts for the current period.
	▪ **Cur Pd Variance**: This column displays the difference between actual and budgeted amounts for the current period.
	▪ **YTD Budget**: This column displays the year-to-date budget.
	▪ **YTD Variance**: This column displays the difference between actual and budgeted year-to-date amounts.
	▪ **Total Bud/EAC**: This column displays either the total **Budget** or total **EAC** amount depending on the selected **Total Budget Type** in the Header.
	▪ **Balance Remaining**: This column displays the remaining amount after you deduct **ITD Plus Pending** from **Total Bud/EAC**.
	The following rows were added:
	▪ **Percent of Budgeted Costs**: This row displays the total expense percentages under the following columns:
	  ▪ **Cur Pd Actual**: This is the percentage of the current period actual expense to the current period budget.
	  ▪ **YTD Actual**: This is the percentage of the year-to-date actual expense to the year-to-date budget.
	  ▪ **ITD Incurred**: This is the percentage of the inception-to-date incurred expense to the inception-to-date budget.
	▪ **Percent of Funded Value**: This row displays the percentage of the **Total Revenue** amount under **ITD Incurred** to the **Funded Value Total** amount in the Header.
	▪ **Percent of Contract Value**: This row displays the percentage of the **Total Revenue** amount under **ITD Incurred** to the **Contract Value Total** amount in the Header.
	▪ **Percent of Time Elapsed**: This row displays the percentage of the number of periods ITD to the number of periods per the contract **Period of Performance** in the Header.
	Note: The number of periods ITD is calculated from the contract start date up to the current period. For example, if the start date is 01/01/21 and the current period is 03/31/22, then the number of periods ITD is 15.

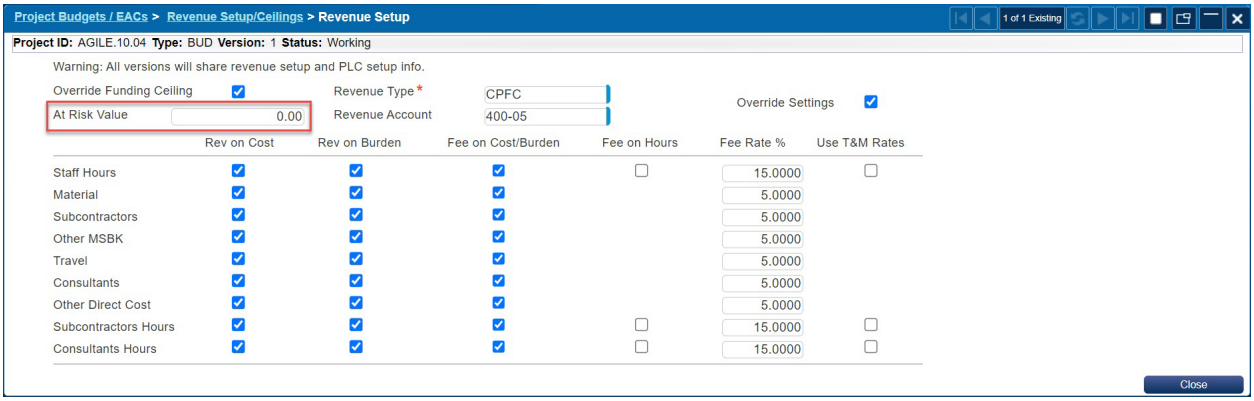
Enhancement to Funding Ceiling Overrides

At Risk Value Field Added on Revenue Setup

When you opt to override the funding ceiling of a Working project budget or EAC (such as for at-risk projects), you can now enter a specific override amount in the new **At Risk Value** field on the Revenue Setup subtask (**Project Budgets/EACs » Revenue Setup/Ceilings**).

To enter an override amount, you must first select **Override Settings** and then **Override Funding Ceiling** to enable the **At Risk Value** field.

The following sample screen displays this new functionality.



Any amount that you enter in the **At Risk Value** field will be reflected in the following:

- Project Budget/EAC subtasks
- Active Level Reports » Revenue Analysis
- Supplemental Reports » Project Status

Columns and Row Added/Renamed

Added/Renamed Columns on Revenue Analysis Subtask

In line with this enhancement, five new columns were added, and two existing columns were renamed on the Revenue Analysis subtask screen.

Column	Description
Hours/Cost Ceiling	This column displays any hours/cost ceilings on applicable account rows.
Under/(Over) Hours/Cost Ceiling	This column displays the under or over amount of hours/cost ceilings on applicable account rows.
At Risk Value	This column displays the override amount from the **At Risk Value** field on Revenue Setup. (Refer to the following section for more details.)
At Risk + Funded Ceiling	This column was previously named **Ceiling**. It displays the total of the At Risk Value and Funded Value amounts. This serves as the new revenue ceiling.

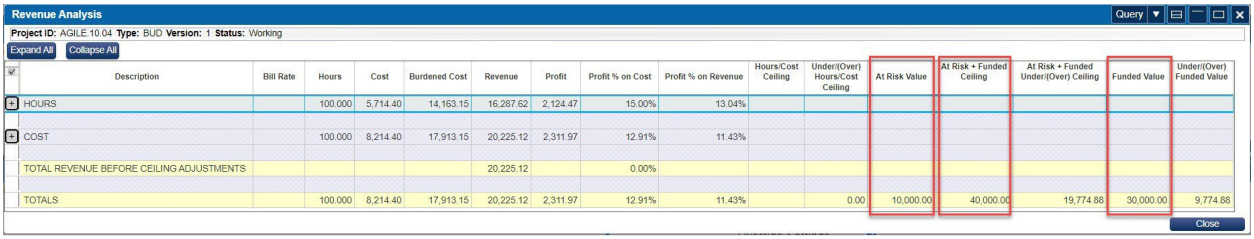
Column	Description
At Risk + Funded Under/(Over) Ceiling	This column was previously named **Under/(Over) Ceiling**. It displays the total of At Risk Value and Funded Value amounts minus the Revenue amount (TOTALS row).
Funded Value	This column displays the **Cumulative** funding value amount from the Project User Flow » Modifications subtask.
Under/(Over) Funded Value	This column displays the amount of Funded Value minus the Revenue amount (TOTALS row).

At Risk Value Column

Related to the addition of the **At Risk Value** field on Revenue Setup, a corresponding **At Risk Value** column was added on Revenue Analysis. Whatever amount you set in the **At Risk Value** field displays under the **At Risk Value** column on the TOTALS row of the Revenue Analysis screen.

To establish a new Planning revenue ceiling, the At Risk Value amount is added to the existing contract funding amount displayed under the **Funded Value** column. This total is displayed under the **At Risk + Funded Ceiling** column.

For example, as the image below shows, the At Risk Value and Funded Value are 10,000 and 30,000, respectively, for a total At Risk + Funded Ceiling of 40,000.



Description	Bill Rate	Hours	Cost	Burdened Cost	Revenue	Profit	Profit % on Cost	Profit % on Revenue	Hours/Cost Ceiling	Under/(Over) Hours/Cost Ceiling	At Risk Value	At Risk + Funded Ceiling	At Risk + Funded Under/(Over) Ceiling	Funded Value	Under/(Over) Funded Value
HOURS		100.000	5,714.40	14,163.15	16,287.62	2,124.47	15.00%	13.04%							
COST		100.000	8,214.40	17,913.15	20,225.12	2,311.97	12.91%	11.43%							
TOTAL REVENUE BEFORE CEILING ADJUSTMENTS					20,225.12		0.00%								
TOTALS		100.000	8,214.40	17,913.15	20,225.12	2,311.97	12.91%	11.43%		0.00	10,000.00	40,000.00	19,774.88	30,000.00	9,774.88

> **Note:** The Funded Value amount is the **Cumulative** funding value from the Project User Flow » Modifications subtask (**Projects » Project Setup » Project Master » Manage Project User Flow**). This same amount also displays under the **Funded Rev** column of the Project Budget/EACs header.

If the **Cumulative** funding value on Project User Flow » Modifications is zero (therefore, the Funded Value amount on the Revenue Analysis subtask is also zero), then the At Risk Value amount becomes the new Planning revenue ceiling and displays under the **At Risk + Funded Ceiling** column.

Renamed Row on Revenue Analysis and Analysis by Period Subtasks

The **Over Ceiling – Funding** row was renamed **Over Bud/EAC Ceiling** on both Revenue Analysis and Analysis by Period subtasks.

Enhancements to New Business Budgeting

The New Business Budgeting module was enhanced as follows:

- The functionality associated with the **Probability %** field was expanded.
- Columns related to opportunities were added.

- A **Project Manager** field was added.
- Certain interface elements were updated to be compatible with web services.
- The Funding subtask was renamed to “Value.”

Enhancements to the Probability Functionality

The **Probability** field in the **Status** section of New Business Budgets was updated to display a default value of 100%. The value is editable, and existing values other than zero are not overwritten.

In addition, the percent value in this field is now also applied to:

- Cost and revenue amounts that are uploaded from new business budgets to organization budgets/outlooks. The default value (100%) is applied if no other value exists.
- Key reports within Organization Budgeting, New Business Budgeting, and Business Intelligence.

Organization Budgeting Updates

An **Apply % Probability to New Business Budgets** checkbox was added to the Organization tab of Configuration Settings (**Administration » Administration Controls**).

When this checkbox is selected, the probability percent value in New Business Budgeting is applied to revenue and cost amounts in Organization Budgeting when you:

- Upload new business budgets to Organization Budgeting using the Mass Upload Project Budgets to Organization Budgets application (**Organization Budgeting » Controls and Utilities**).
- Run the following reports:
  - Rate Processing/Reports » Rate Analysis by Project
  - Profit and Loss Reports » Profit and Loss by Project
  - Supplemental Reports » Org Job Summary
  - Plug Processing and Reports » Plug Project Review

Note: If **Apply % Probability to New Business Budgets** is not selected, revenue and costs are always calculated at the default probability value of 100%.

New Business Budgeting Updates

An **Apply % Probability** checkbox was added to reports within New Business Budgeting.
When this checkbox is selected, budget amounts calculate based on the percent in the **Probability %** field of the New Business Budgeting screen. If **Apply % Probability** is not selected, budgeted values display at 100%.

Affected applications in **New Business Budgeting » Reports/Inquiries** include:

- Multi-New Business Budget Consolidation (Revenue/Cost)
- New Business Budget Summary (Revenue/Cost)
- Structured New Business Budget Summary (Revenue/Cost)

Related Changes for Business Intelligence Reporting

The Report Table Update Process application (**Administration » Administration Utilities**) was updated so that the **Apply % Probability** field is also available to users of Business Intelligence.

Added Opportunity Value and Estimated Value Fields to New Business Budgets

To establish a revenue ceiling value, two columns, **Opp Value** (Opportunity Value) and **Est Value** (Estimated Value), were added in the New Business Budgets Status section of the New Business Budgets screen (**Planning » New Business Budgets**).

The table below describes these new columns.

Column	Description
Opp Value	**Opportunity Value**. If the New Business Budget is linked to a Contract Opportunity, the field under this column is populated with the amount entered in the **Our Value** field on the Status tab of the Manage Opportunities screen (**CRM & Contracts » Opportunities » Opportunities**). Should the **Our Value** amount change, such change will be reflected in the **Opp Value** field the next time a new business budget is committed.
Est Value	**Estimated Value.** All the fields under this column are editable. You can enter amounts as follows: ▪ If the New Business Budget is linked to a Contract Opportunity and the value from the **Our Value** amount is at a higher level of the budget than the budgeting level, you can edit the **Est Value** at the budgeting level to distribute the value amount to lower levels. ▪ If the New Business Budget is not linked to a Contract Opportunity, you can enter amounts at the budgeting level, and these amounts will roll up to the higher levels of the budget. ▪ The amount in this field will also display in the **Value** column on the Value subtask (formerly named Funding).

Project Manager Field Added

A **Project Manager** field was added to the New Business Budgets Status section of the New Business Budgets application.

The value you enter at the top level automatically populates the lower-level budgets, but the field is editable at all levels.

The field was also added to all reports under **New Business Budgeting » Reports/Inquiries**.

Budget Action Checkboxes Converted to List Items

An **Actions** drop-down list, which replaces three existing budget action checkboxes, was added to the New Business Budgets Status section of the New Business Budgets application.

The removed checkboxes now display as items in the **Action** drop-drop down list and include:

- Create Budget
- Modify Budget

- Commit Budget

Note: Standard rules for creating, modifying, or committing a budget apply.

The interface changes described above are related to an ongoing effort to make the Costpoint Planning budgeting applications more compatible with web services.

Labor Report Enhancements

New Setting to Filter Labor Data of Inactive Resources

Multiple labor analysis reports were updated with an **Include Inactive Resources** setting that enables you to include or exclude inactive resources based on the state of the checkbox, selected or clear.

The checkbox was added to the following applications:

- **Project Budgeting » Top Level (All Projects) Reports**
  - Labor Hours Analysis
  - Labor Cost Analysis
- **Organization Budgeting » Labor Analysis Reports**
  - Labor Hours Analysis
  - Labor Cost Analysis

Prior to this update, inactive resources were included by default. To obtain this same result now, leave the checkbox selected.

Conversely, if you clear the checkbox, inactive resources are now excluded from the report entirely when their termination dates are earlier than the selected reporting period.

When the checkbox is clear and termination dates overlap with the reporting period, inactive resources display, but their labor details are included only through their respective termination dates, not after them.

Columns that display total hours or costs are also adjusted to reflect excluded labor details.

Note: When termination dates are later than the selected reporting period, labor data, where found, is included in all periods even if the checkbox is clear.

Related Updates to Resource Status Display in Organization Budgeting

In Organization Budgeting, the Labor Hours Analysis and Labor Cost Analysis reports were updated to indicate employee status in a manner equivalent to those same two reports in Project Budgeting.

Now, under **Details** in all four reports, employee status (Active, for example) is indicated next to the employee's name. Terminated employees are indicated by "Term" and the termination date.

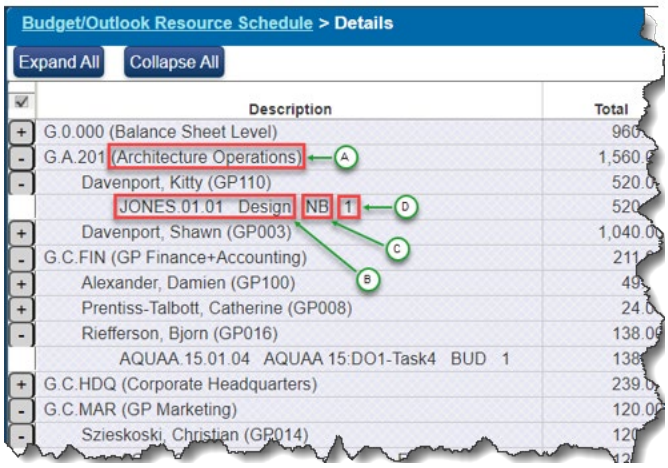
When the reports are run with **Combined** selected, the status is indicated with two columns:

- **Status:** This column displays either ACT (active) or IN (inactive).
- **Term Date:** This column displays the termination date, or if the employee is not terminated, it displays **Active**.

Note: For the Labor Cost Analysis report in Organization Budgeting, these same updates were also applied to the Audit Subtask.

Interface Updates to Budget/Outlook Resource

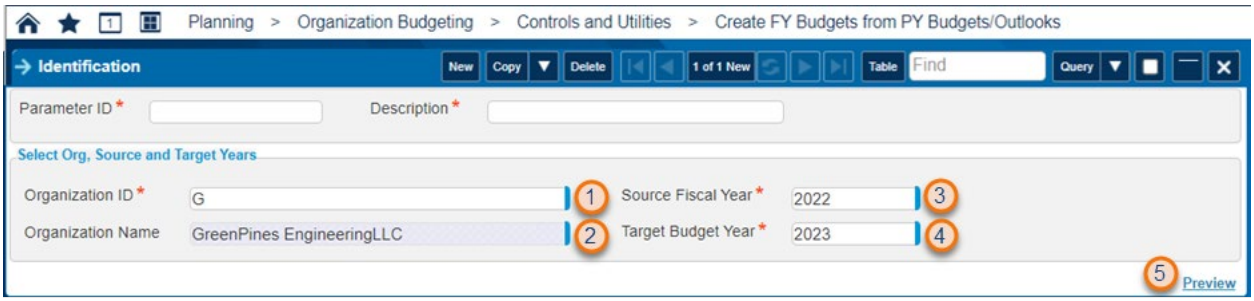
Several interface updates were applied to the Budget/Outlook Resource Schedule report (**Organization Budgeting » Labor Analysis Reports**), as described in the table that follows below.

Screen Section	Update
Period	**End Date** now displays as **Start Date** if **Report Type** is set to either of the following: ▪ **Cost** ▪ **Hours** with **Rolling Year** also selected
Details	In the expanded view, individual line items now display additional information. For details, refer to the image and associated letter keys below.  **A** Organization name **B** Project name **C** Budget type (NB, BUD, or EAC) **D** Budget version

New Option to Source Org Budgets from Previous Years

The new Create FY Budgets from PY Budgets/Outlooks application (**Organization Budgeting » Controls and Utilities**) enables you to create future fiscal year (FY) organization budgets from prior year (PY) budgets or outlooks.

After you run the utility, data from the prior year budget or outlook automatically populates the new budget. The image and table below provide an overview of the screen fields and functionality.



Key	Field	Description
1	**Organization ID**	Click to select a top-level organization ID. **Note:** Budgets will be created at the same level as the budgets or outlooks in the Source Fiscal Year of the selected Organization ID.
2	**Organization Name**	This field automatically populates with the organization name that corresponds with the selected organization ID.
3	**Source Fiscal Year**	Click to select a prior fiscal year from which to copy the source budget or outlook data for the target budget year. **Note:** If a committed budget or outlook does not exist in the source fiscal year that you intend to use, an error message displays.
4	**Target Budget Year**	Click to select a target fiscal year for which you want to create an organization budget. The labor data, including splits for direct and indirect labor, will be copied to the new budget subtasks down to the employee level. However, top level budgets, top level outlooks, and rates post entries in the source fiscal year will not be copied to the target budget year. **Notes:** ▪ Only the initialized budget years will display on the drop-down list and lookup table when you select a target budget year. ▪ Make sure that there are no existing organization budgets in the target fiscal year, or they will need to be deleted to continue.
5	**Preview**	After you have entered the required information into the fields, click this subtask to display the available budgets/outlooks for your specified source and target budget years.

For more information on this screen, including fields on the Preview subtask, see the Online Help.

New Org Budgeting Option for Creating Top Level Budgets

The Create Top Level Outlook application (**Organization Budgeting » Budget/Outlook Processing**) now includes the added ability to create top level org budgets.

Since you can now create budgets as well as outlooks, the screen was updated as follows:

- The word “Budget” was added to the title (Create Top Level Budget/Outlook).
- Buttons were added for both options:
  - **Top Level Budget**: Choose this option to create a top level budget for the selected org ID.
  - **Top Level Outlook**: Choose this option to create a top level outlook for the selected org ID.
- On-screen instructions were updated so that they change depending on the option selected.

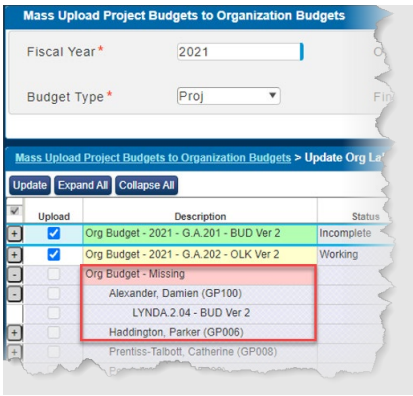
Similar to top level outlooks, top level budgets capture labor, non-labor, and revenue amounts that exist at higher level orgs in project budgets than currently exist in org budgets.

> **Reminder:** If **Org Budget Revenue Calculation** on the Organization tab of Configuration Settings is selected as **Org Revenue Calculation** (also known as the Traditional Method of calculating revenue), the revenue amounts from project budgets are never shared to org budgets.

Other Related Updates

The Mass Upload Project Budgets to Organization Budgets utility (**Organization Budgeting » Controls and Utilities**) was enhanced to account for missing top level org budgets during the upload process.

If an upload includes details for top level org budgets that are not yet created, the details display under **Org Budget – Missing** within the utility. For example:



If the error shown above does occur, return to the Create Top Level Budget/Outlook application, create the budget(s), and then rerun the upload process in the utility.

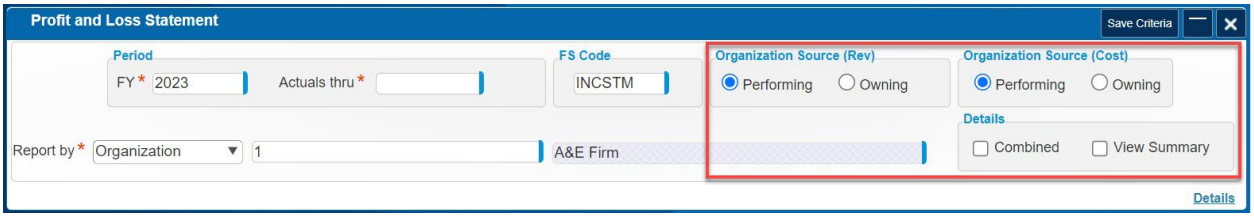
Update to Profit and Loss Statement Report

The Profit and Loss Statement screen (**Organization Budgeting » Profit and Loss Reports**) was updated to include the following new sections:

- **Organization Source (Rev)**: Select either **Performing** or **Owning** to generate a report using revenue as the Organization Source.

Organization Source (Cost): Select either **Performing** or **Owning** to generate a report using cost as the Organization Source.

- **Details**: Generate a report using either **Combined** or **View Summary**, or both.

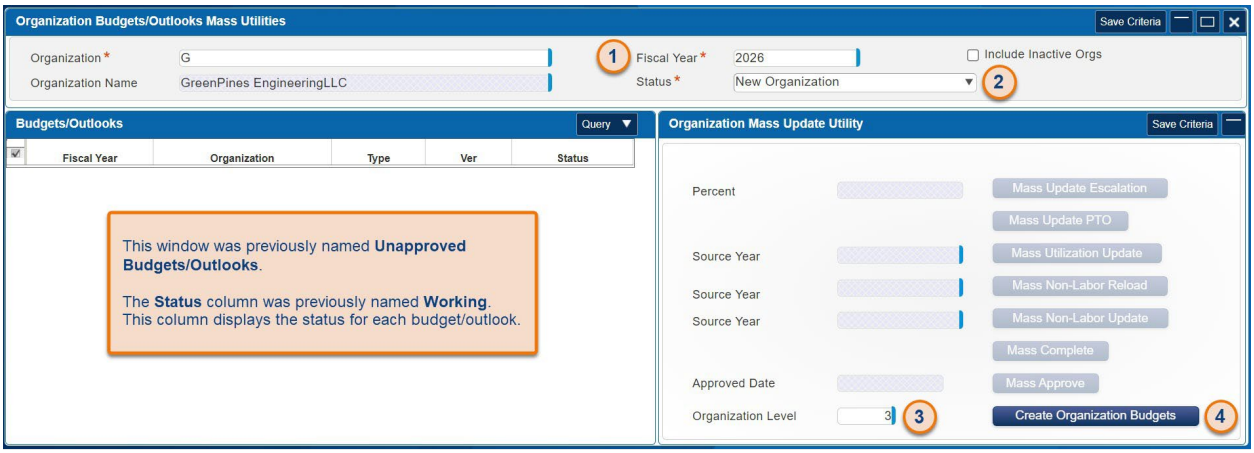


This update makes the Profit and Loss Statement screen consistent with the other Org P&L reports.

Enhancement to Org Budgets Mass Utilities

The Organization Budgets/Outlooks Mass Utilities application (**Organization Budgeting » Controls and Utilities**) includes new functionality that enables you to mass create organization budgets both for new fiscal years and for the current fiscal year.

The sample image below indicates the updates on the application screen.



The following table describes the fields that are related to this new functionality.

Key	Field	Description
1	**Fiscal Year**	Click to select a fiscal year.
2	**Status**	The drop-down list includes **Unapproved Budgets/Outlooks**, **Approved Budgets/Outlooks**, or **New Organization**. Select **New Organization** to mass create organization budgets for a new fiscal year. Select **Approved Budgets/Outlooks** to mass create organization budgets for the current fiscal year.
3	**Organization Level**	Click to display a lookup table, then select **1**, **2**, or **3**.

Key	Field	Description
		Note: After you have selected a top-level organization ID, this field automatically populates with an editable organization level number.
4	**Create Organization Budgets**	Click this option button to mass create organization budgets for a new fiscal year or for the current fiscal year. **Note:** This button is enabled only when you select either **New Organization** or **Approved Budgets/Outlooks** in the **Status** field.

Update to Project Budget/EAC Mass Utilities

The **Mass Update Process** section of the Project Budget/EAC Mass Utilities screen (**Project Budgeting » Controls and Utilities**) includes new buttons for batch updating the statuses of budgets or EACs.

Behavior of the new buttons is consistent with existing ones, where they are enabled or disabled based on the status of the budget or EAC, and the action performed is based on standard budget rules.

The new buttons and the actions they perform are described as follows:

- **Modify**: This option changes Incomplete or Complete budgets or EACs to Working.
- **Mark Incomplete**: This option changes Complete budgets or EACs to Incomplete.
- **Unapprove**: This option changes Approved budgets or EACs to Complete.

Default Burden Template Configuration Enhancement

The Project tab of the Configuration Settings screen was updated with a **Default Burden Template** field that enables Administrators to set any burden template as the default version.

Prior to this enhancement, the default template was set by the system and could not be changed.

The new configuration setting still defaults to the current template (also named Default), which is based on the Costpoint FY Pool Configuration. However, if a different template is selected, that one becomes the new default value for any Working status budgets created or imported in the following applications:

- Planning » Project Budgets/EACs
- Planning » New Business Budgets
- New Business Budgeting » Controls and Utilities » Import New Business Budgets from Excel

As before, users can select a template other than the default version from within the above applications.

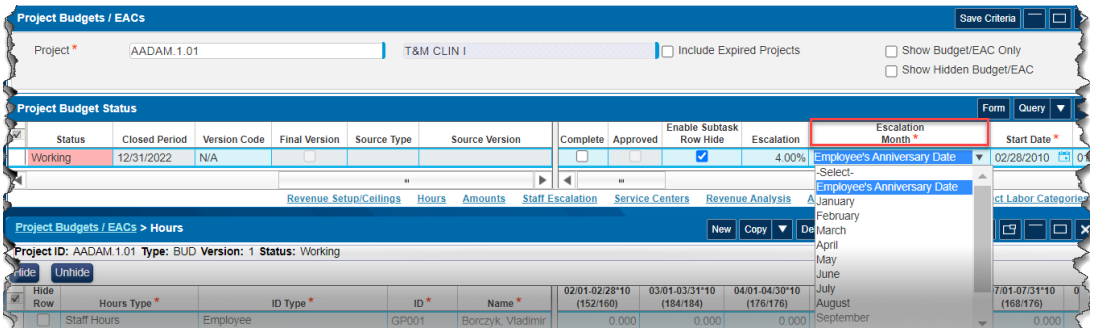
Related Update to Project Budget/EACs Mass Utilities

The Project Budget/EAC Mass Utilities application (**Project Budgeting » Controls and Utilities**) was updated with a new **Burden Template** button. Click this button to change the default burden template for all selected Working status budgets.

The default template is the same one selected from **Default Burden Template** in Configuration Settings.

Enhancement to Escalation Functionality

Project Budgets/EACs includes a new **Escalation Month** field that enables you to change the escalation period at the project level on Working status budgets. For example:



Note: Previously, the escalation period could be changed only at the employee level.

From the **Escalation Month** drop-down list, you have the option to base the escalation period either on the work anniversary date of the employee or on a month of the year. The value you select becomes the basis for escalation in all future budgets for that project.

Related Update to Utilities

The **Escalation Month** field was also added to the **Mass Update Process** section of the Project Budget/EAC Mass Utilities screen (**Project Budgeting » Controls and Utilities**).

Use this field to update multiple Working status budgets or EACs with the same change to the escalation period when you run the mass Escalation process.

Enhancements to Import from Excel

To provide you with additional options for managing data imported from Excel, the import utility was updated with new functionality as described below.

Import Utility Update

The **Upload Options** section of the Import Budget/EACs from Excel application (**Project Budgeting » Controls and Utilities**) was updated with a new **Budget or EAC creation** field that enables you to indicate whether you are importing budgets or EACs.

Note: If you upgraded from Costpoint version 8.1.9 or later, this option was already available to you.

The import results vary according to the status of the latest existing budget or EAC, or if no budget or EAC exists, they vary based on the option selected. For example, if you select:

- **Budget**: A new budget is created with a status of Working and is assigned a version number.
- **EAC**: An error occurs because EACs can be created only if an approved budget already exists.

The table below describes the import results according to status when a budget or EAC already exists.

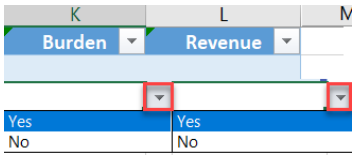
Status of Latest Budget or EAC	Results Following Import
Complete Incomplete Working	A working version with the same version number is created. Note that the old version remains available until the new one is committed.
Approved	A new working version with a new version number is created.

Import Template Update

To further optimize control over imported data, the import template itself (available from the Excel Template subtask) was updated with two new columns: **Burden** and **Revenue**. Both columns on the template (K and L, respectively) are empty by default.

If the columns are left blank, the burden and revenue setup rules from the project are applied.

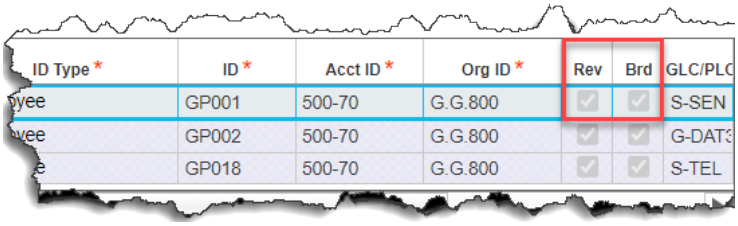
Prior to uploading data, you can modify columns K and L of the Excel template by selecting **Yes** or **No** per row from the row selector drop-down. For example:



The table below describes the result of selecting **Yes** or **No** for either column:

Column	Yes	NO
Burden	Burden is calculated for the imported row.	Burden is not calculated for the imported row.
Revenue	Revenue is calculated for the imported row.	Revenue is not calculated for the imported row.

Note also that the **Revenue** and **Burden** columns on the Excel template relate to the **Rev** and **Brd** checkboxes on the Hours or Amounts subtasks, as shown below from Project Budgets/EACs.



Continuing the example above, if the **Burden** column for a row in the Excel template was selected as **No**, following import, the **Brd** checkbox of the associated row in the budget or EAC would not be selected.

Access the Template

The updated template is available for use in both of the following import utilities:

- Import Budget/EACs from Excel (**Project Budgeting » Controls and Utilities**)
- Import New Business Budgets from Excel (**New Business Budgeting » Controls and Utilities**)

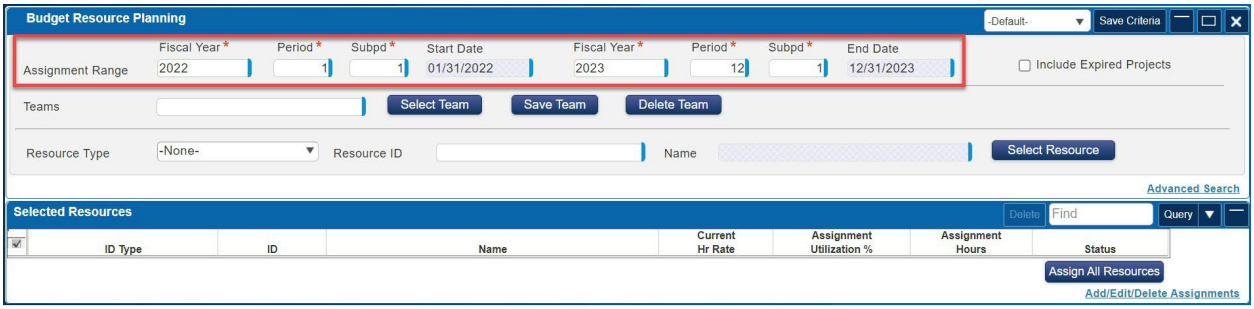
From either application, you can download the template from the Excel Template subtask, where download instructions are also provided.

Enhancements to Assignment Range and Reschedule Functionality

The **Resource Planning » Budget By Resource** application was enhanced to facilitate the rescheduling of employee work assignments within budget periods using the new fiscal year, period, and subperiod fields.

New Assignment Period Lookup Fields

In Assignment Range, the Calendar tool was replaced with **Fiscal Year**, **Period**, and **Subpd** fields. Click each field to display a lookup and then select a value. Based on your selected values, the **Start Date** and the **End Date** fields will populate automatically.

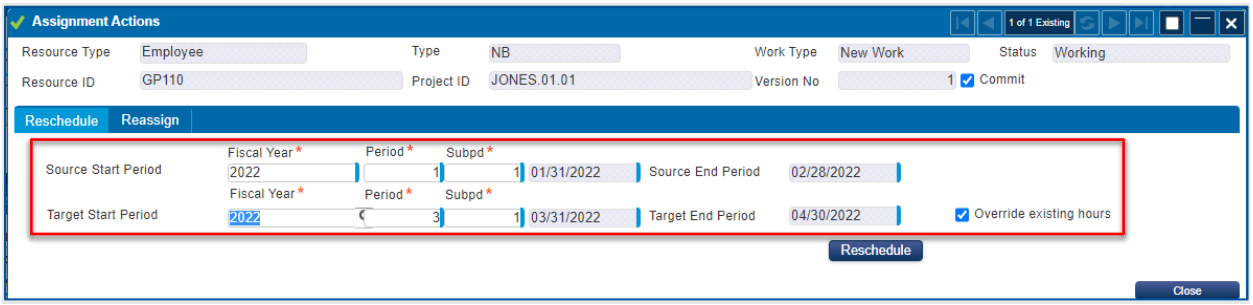


The following table describes the assignment period lookup fields.

Field	Description
Fiscal Year	Click to select a fiscal year.
Period	Click to select a period.
Subpd	Click to select a subperiod.
Start Date	This field displays the starting date of the assignment based on the selected values for fiscal year, period, and subperiod.
End Date	This field displays the ending date of the assignment based on the selected values for fiscal year, period, and subperiod.

Enhanced Reschedule Functionality

The Reschedule tab of the Assignment Actions dialog box (accessed by clicking the **Action** hyperlink on the Add/Edit/Delete Assignments subtask) includes the new assignment period lookup fields.



The following table describes the enhanced Reschedule functionality according to the values set in the assignment period lookup fields.

Period	Description
Source Start Period	This period displays the default field values from the header, and the first period of the project budget whether the period has assigned hours or not. The **Fiscal Year**, **Period**, and **Subpd** fields for this period are editable.
Source End Period	This period displays the project budget's last period with assigned hours.
Target Start Period	This period displays the default field values from the header. The **Fiscal Year**, **Period**, and **Subpd** fields for this period are editable. **Note:** If the Target Start Period is earlier than the current budget, the Assignment Range in the header must include the earlier period. If the Target Start Period is outside the project budget's start and end periods, this message displays "Error Invalid reschedule start date."
Target End Period	This period defaults to the Source End Period but changes when you edit and refresh the Target Start Period, giving the same number of budgeted periods as that in the Source Start to Source End periods. **Note:** If you move the schedule to future periods and the Target End Period goes beyond the budget period, a message displays indicating that the budget hours will be truncated.

The **Override existing hours** checkbox allows you to select assignment rescheduling options.

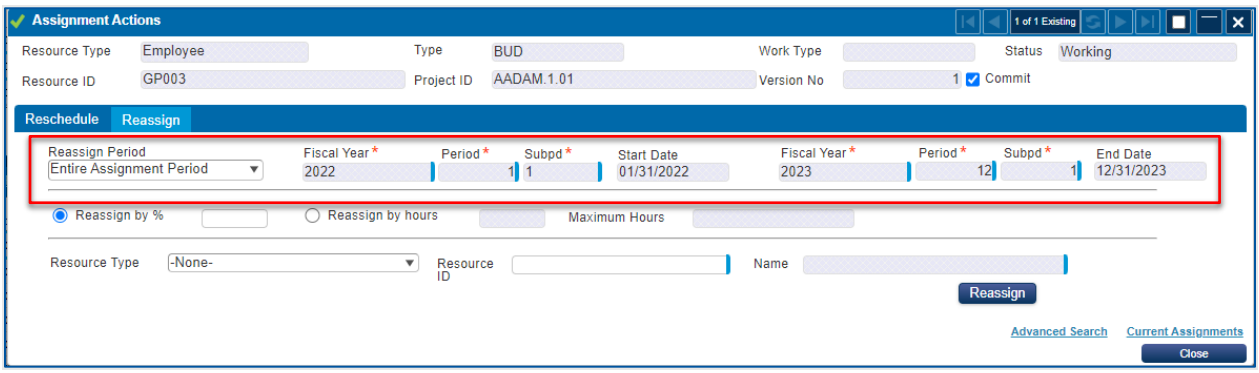
Checkbox Setting	Description
Selected	This setting will override (overwrite) the existing hours in the target budget periods when you reschedule an assignment.

Checkbox Setting	Description
Clear	This setting will add the rescheduled hours to the existing hours in the target budget periods.

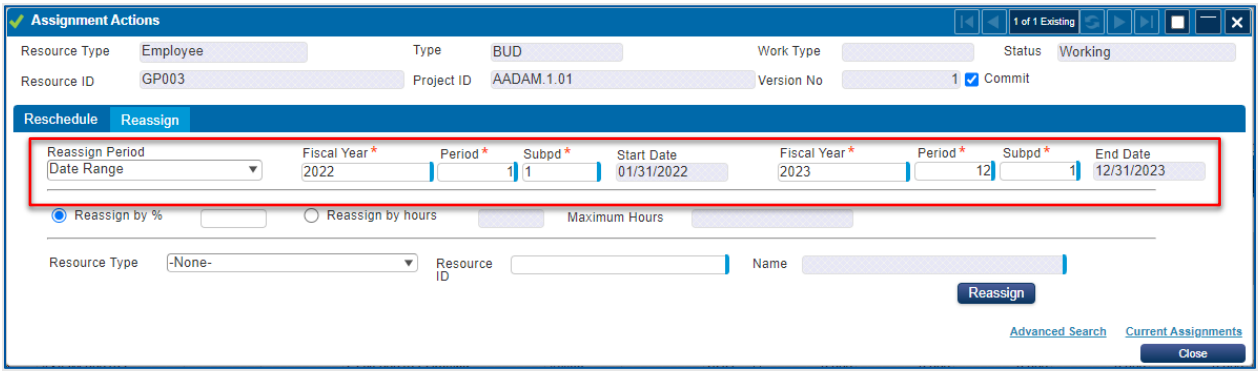
Enhanced Reassign Functionality

The Reassign tab of the Assignment Actions dialog box also includes the new assignment period lookup fields.

When you set the **Reassign Period** field to **Entire Assignment Period,** the values of the **Fiscal Year**, **Period**, and **Subpd** fields will default from the header. The **Start Date** and **End Date** fields will populate automatically based on the default values. All these fields are not editable.



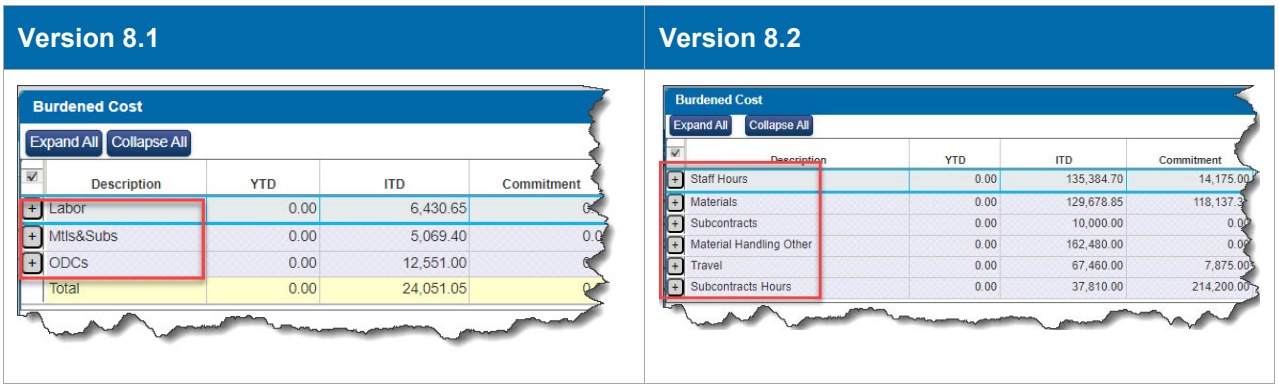
When you set the **Reassign Period** field to **Date Range**, the values of the **Fiscal Year**, **Period**, and **Subpd** fields will also default from the header but are editable. The **Start Date** and **End Date** fields will populate automatically based on the defaults or on your selected values.



Updates to Cost Category Names in Planning Reports

Many reports and subtasks throughout Costpoint Planning were updated to categorize cost results according to Budget Sheet rather than Major Key descriptions.

For example, below is the same report (Direct Project Cost Categories) shown in versions 8.1 and 8.2.



Note that some reports will continue to display a mix of the old and new categories. For example, if a category name is derived from a pool type, it might have the same name as a Major Key descriptor.

Related Updates to Maintain Account Mapping

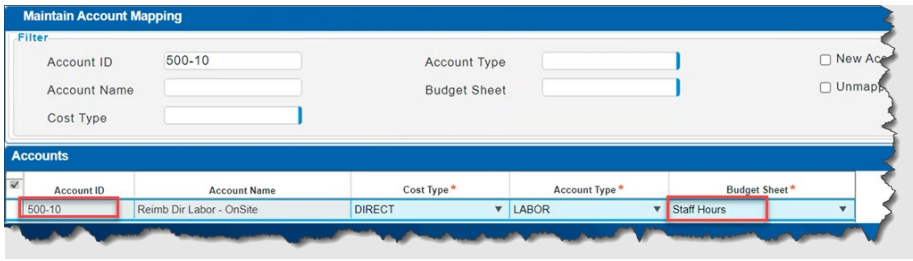
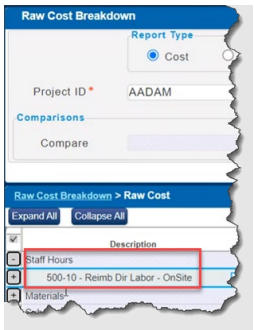
In Maintain Account Mapping (**Administration » Administration Controls**), the **Report Type** and **Major Key** fields were replaced by the **Budget Sheet** field, and accounts are now mapped to the option selected from this field.

The Lookup for **Budget Sheet** includes the following options:

- Staff Hours
- Materials
- Subcontracts
- Material Handling Other
- Travel
- Consulting
- Other Direct Costs
- Subcontractor Hours
- Consultant Hours
- Staff Escalation
- Burdened Cost

The descriptions above are now used as the cost categories within reports and report subtasks throughout Costpoint Planning.

For example, if an account ID is mapped to the Staff Hours budget sheet, when you run a related report that includes that account ID, it will be organized under the Staff Hours heading in the report details.

Account Mapping	Report Result
	

Affected Reports

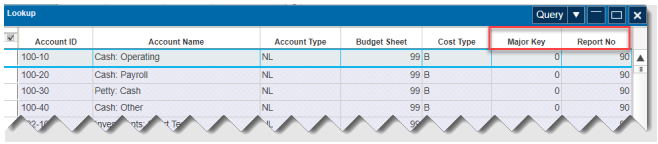
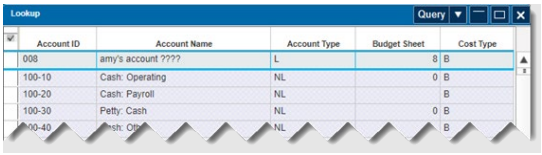
The table below lists the reports that now display accounts according to Budget Sheet rather than the Major Key descriptions.

Area	Screen
Organization Budgeting » Profit and Loss Reports	Profit and Loss Chart by Period
	Profit and Loss Chart – Cumulative
	Transaction Analysis
Organization Budgeting » Supplemental Reports	Org Job Summary
Organization Budgeting » Non-Labor Analysis Reports	Non-Labor Analysis
Organization Budgeting » Plug and Processing Reports	Plug Project Review
Project Budgeting » Top Level (All Projects) Reports	Project Cost
Project Budgeting » Level Down Reports	Level Down Project Cost Categories
	Level Down Project Cost
Project Budgeting » Active Level Reports	Hours Breakdown
	Raw Cost Breakdown
	Burdened Cost Breakdown
	All Cost Breakdown
	Project Cost Chart
	T&M Billable Revenue Breakdown

Area	Screen
New Business Budgeting » Reports/Inquiries	New Business Budget Summary (Revenue/Cost)
	Multi-New Business Budget Consolidation (Revenue/Cost)

Columns Removed from Account ID Lookups

The **Major Key** and **Report No** columns were removed from the Account ID Lookup. For example.

Version 8.1	Version 8.2
	

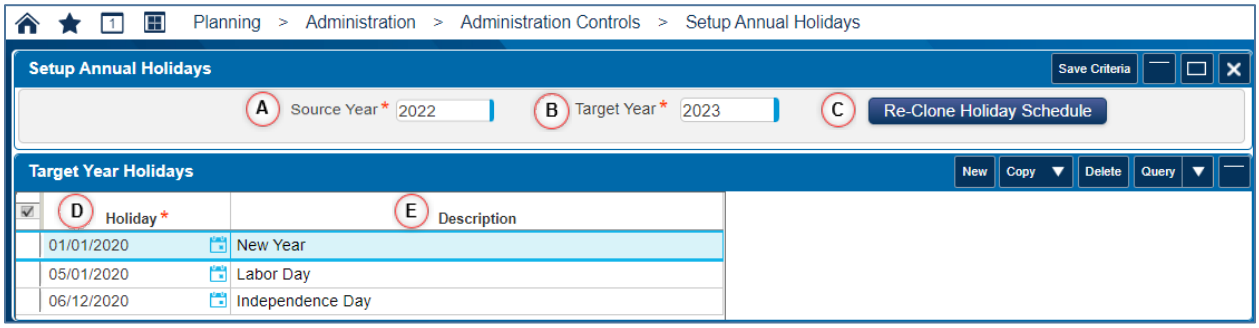
The affected applications are listed in the table below.

Module	Area » Application
Organization Budgeting	▪ **Controls and Utilities » Maintain Generic Staff** ▪ **Budget/Outlook Processing » Organization Budget Cycle Initialization**
Project Budgeting	**Active Level Reports » Transaction Analysis**
Administration	**Administration Controls » Override Project Budget Sheet Account IDs**

New Application for Creating Holiday Schedules

A Setup Annual Holidays application (**Administration » Administration Controls**) was added that enables you to create holiday schedule for future fiscal years based on those from a previous one.

The image and table below provide an overview of the screen fields and functionality.

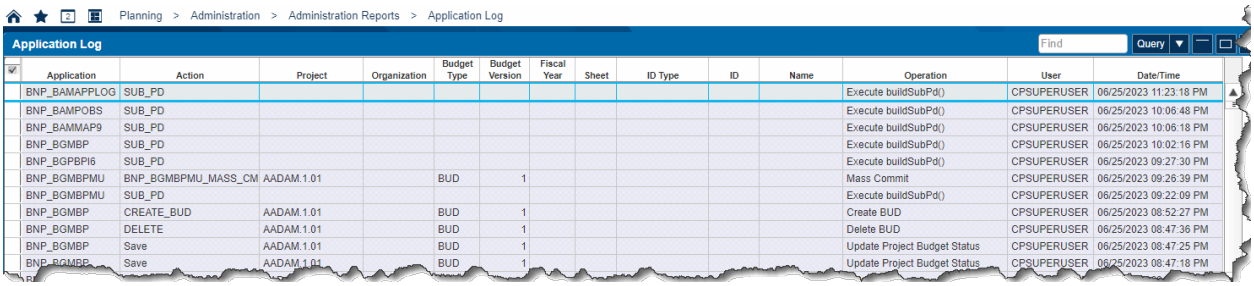


Key	Field	Description
A	**Source Year**	Click to select the fiscal year of the holiday schedule you want to clone.
B	**Target Year**	Click to select the target fiscal year for the holiday schedule you want to create.
C	**Re-Clone Holiday Schedule**	Click this button to clone the schedule from the source year to the target year. **Note:** After the process is finished, the cloned holiday schedule displays in the Target Year Holidays table, where you can edit dates or add and delete holidays if necessary.
D	**Holiday**	Click to edit the date.
E	**Description**	This field displays the description of the holiday.

For more information on this screen, see the Online Help.

New Auditing Application

A new Application Log screen (**Administration » Administration Reports**) was added that records actions and changes made to applications throughout Planning.



Application	Action	Project	Organization	Budget Type	Budget Version	Fiscal Year	Sheet	ID Type	ID	Name	Operation	User	Date/Time
BNP_BAMAPPLOG	SUB_PD										Execute buildSubPd()	CPSUPERUSER	06/25/2023 11:23:18 PM
BNP_BAMPOBS	SUB_PD										Execute buildSubPd()	CPSUPERUSER	06/25/2023 10:06:48 PM
BNP_BAMMAP9	SUB_PD										Execute buildSubPd()	CPSUPERUSER	06/25/2023 10:06:18 PM
BNP_BGMBP	SUB_PD										Execute buildSubPd()	CPSUPERUSER	06/25/2023 10:02:16 PM
BNP_BGPBPI6	SUB_PD										Execute buildSubPd()	CPSUPERUSER	06/25/2023 09:27:30 PM
BNP_BGMBPMU	BNP_BGMBPMU_MASS_CM	AADAM.1.01		BUD	1						Mass Commit	CPSUPERUSER	06/25/2023 09:26:39 PM
BNP_BGMBPMU	SUB_PD										Execute buildSubPd()	CPSUPERUSER	06/25/2023 09:22:09 PM
BNP_BGMBP	CREATE_BUD	AADAM.1.01		BUD	1						Create BUD	CPSUPERUSER	06/25/2023 08:52:27 PM
BNP_BGMBP	DELETE	AADAM.1.01		BUD	1						Delete BUD	CPSUPERUSER	06/25/2023 08:47:36 PM
BNP_BGMBP	Save	AADAM.1.01		BUD	1						Update Project Budget Status	CPSUPERUSER	06/25/2023 08:47:25 PM
BNP_BGMBP	Save	AADAM.1.01		BUD	1						Update Project Budget Status	CPSUPERUSER	06/25/2023 08:47:18 PM

Administrators can use this screen for audit tracking. For more information, see the Online Help.

Updates to Planning Related to Business Intelligence

To support a new column in Business Intelligence, the backend of Planning was updated to replace a drop view (VW_EORGS_LEVELING & VW_EACCT_LEVELING) with tables (BI_ORG_LEVELING & BI_ACCT_LEVELING).

Planning Database Changes

Related to further backend integration with Costpoint, numerous changes were applied to tables, columns, and views within Costpoint Planning. For a list of these changes, see Deltek Costpoint PL 82 Database Changes.

Projects

This section describes Costpoint 8.2 enhancements for the Projects domain.

Ability to Split Labor and Non-Labor Fees in Billing

In previous Costpoint versions, there was an inconsistency between billing and revenue calculations for Cost Plus Fee On Cost (CPFC) formulas. When computing revenue, users can select different fee amounts for labor and non-labor accounts. In billing calculations, on the other hand, users would need to set up cost fee overrides for each account charged to the project in order to maintain a different fee for labor and non-labor accounts. The latter is labor-intensive and also prone to errors.

To address the issue, Costpoint 8.2 allows you to split labor and non-labor fees in billing. You no longer need to set up fee overrides as you can now select different fee percent values for labor and non-labor accounts on the Manage Project Billing Information screen. Several other applications were also updated to reflect changes in calculations and to separately print labor and non-labor fees on screens and bills.

Manage Project Billing Information (BLMINFO)

On the Setup Information tab of this screen, the **Billing Formula** description for CPFC has been updated from **Cost Incurred Plus Fee on Cost** to **Cost Plus Fee On Cost** for consistency with the CPFC revenue formula description.

When you select the CPFC billing formula, the **Billing Parameter 1** and **Billing Parameter 2** fields now display **Labor Fee Pct.** and **Non-Labor Fee Pct.**, respectively, and you can enter separate fee values for labor and non-labor.

> **Note:** Previously, the CPFC billing formula stored only one **Fee Percent** value on this screen. When you upgrade to Costpoint 8.2, the **Fee Percent** value for old records will be copied over to both the **Labor Fee Pct.** and **Non-Labor Fee Pct.** fields.
>
> For these records, you will continue to see the historical fee as a combined fee value in both fields unless you modify **Labor Fee Pct.** and **Non-Labor Fee Pct.** on this screen. Alternatively, you can edit the billing history tables and manually separate the historical fee amounts for labor and non-labor accounts to break out the fees on your invoices.

The following tables have been updated to store the updated billing formula and the separate labor and non-labor fee percentages:

- S_BILL_FORMULA
- PROJ_BILL_INFO

Manage Project User Flow (PJMBASIC)

The same updates made for Manage Project Billing Information have been applied to the Proj Bill Info subtask of Manage Project User Flow.

Mass Add Project Master Data (PJPMADD)

This application has been updated to incorporate the changes made in Manage Project Billing Information when adding or updating projects and **Project Billing Info** is selected in the **Include** group box.

Calculate Standard Bills (BLPGBILL) and Calculate Retroactive Bills (BLPRBIL)

Both applications have been updated such that the labor fee and non-labor fee percentages indicated in Manage Project Billing Information for the CPFC billing formula are correctly included when computing standard and retroactive bills.

The following tables have also been updated to store labor and non-labor fee amounts as computed by the two screens:

- BILL_EDIT_DETL
- BILL_EDIT_INVC_HDR

Manage Standard Bills (BLMGBILL)

In the Standard Bill Details table window, the **Total Fee** group description now has separate rows for **Fee** and **Labor Fee** to display non-labor and labor amounts, respectively.

Post Standard Bills (BLPGEN)

Post Standard Bills has been updated to ensure that the bills are posted correctly with the same or different labor and non-labor fees.

The following tables have also been modified to accommodate the updates for this enhancement:

- AR_DETL_HS
- AR_HDR_HS
- BILL_EDIT_DETL_CUM
- BILL_EDIT_HDR_CUM
- BILL_INVC_HDR_HS
- BILLING_DETL_HIST
- BILLING_SUM
- FS_SUM
- GL_DETL
- GL_POST_SUM
- PROJ_BILL_HS

If you are using Accounting Classification Reference Number (ACRN) bills and reference numbers, note that the following tables have also been updated:

- PROJ_ACRN_DETL
- PROJ_ACRN_DETL_CUM
- PROJ_BILL_ACRN
- PROJ_BILL_ACRN_CUM
- REF_SUM

Print Billing Worksheet (BLRBILLW)

Labor and non-labor fees are now printed in separate rows in the Billing Worksheet when the billing formula selected on the screen includes **Cost Plus Fee On Cost (CPFC)**. Labor fees display on the **Labor Fee** line, while non-labor fees display on the **Fee** line.

Print Standard Bills (BLRMBIL)

When you are printing an invoice where the billing formula is set to **Cost Plus Fee On Cost (CPFC)**, Costpoint now prints labor and non-labor fees in separate rows in standard bills. Labor fees display on the **Labor Fee** line, while non-labor fees display on the **Fee** line.

Reverse Previous Bills (BLPREVB)

This application has been updated to make sure that the reversal amounts populate the correct fields when reversing a standard bill that contains labor and non-labor fees.

Affected tables for this update include:

- BILL_EDIT_DETL
- BILL_EDIT_INVC_HDR
- OPEN_BILLING_DETL (The system updates this table once the reverse bill is actually posted.)

Import Project Master Data (PJPPREP)

Import Project Master Data has been updated such that labor and non-labor fees are correctly imported from an input file into Costpoint when S_BILL_FORMULA_CD is set to CPFC.

There are no changes in the input file layout of the PROJ_BILL_INFO.csv file. The following existing columns will store the labor and non-labor fee percent values:

- **BILL_CALC_AMT**: This will store the labor fee percent.
- **BILL_CALC1_AMT**: This will store the non-labor fee percent.

Historical Data Updates

To ensure that the cumulative amounts for labor and non-labor fees for bills using CPFC are correctly reported and presented on invoices moving forward, the following billing history tables have been updated:

- BILLING_DETL_HIST
- BILLING_SUM
- BILL_EDIT_DETL_CUM (When the bill is posted.)

Historical billing transactions are displayed on the following screens:

- Manage Billing History (BLMBHIST)
- Manage Closed Billing Detail (BLMCLOSE)

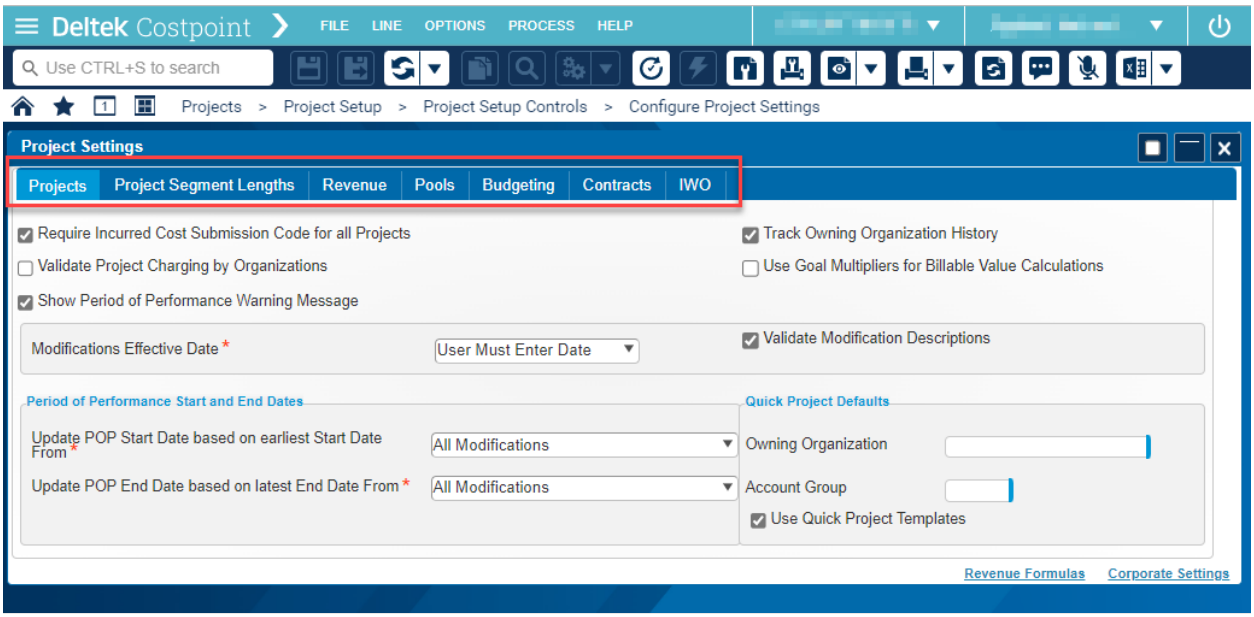
Cobra Interface Applications Moved to the Projects Domain

Previously located under the System Administration module in the Admin domain, the following applications are now available in the Cost and Revenue Processing module in the Projects domain (**Projects » Cost and Revenue Processing » Cost and Revenue Processing Interfaces**):

- Configure Cobra Interface Settings (AOMCBSET)
- Manage Cobra Charge Templates (AOMCBCHG)
- Manage Cobra Resource Templates (AOMCBBET)
- Manage Cobra Cost Templates (AOMCBCST)
- Manage Cobra Project Mapping (AOMCBPRJ)
- Manage Cobra Extraction Parameters (AOMCBEXT)
- Compute Cobra Burden Costs (AOPCBLAB): This is also still accessible via **Projects » Cost and Revenue Processing » Project Cost Processing**.
- Manage Prior Year Cobra Costs (AOMCBPYC): This is also still accessible via **Projects » Project Setup » Project History**.

Configure Project Settings Updates

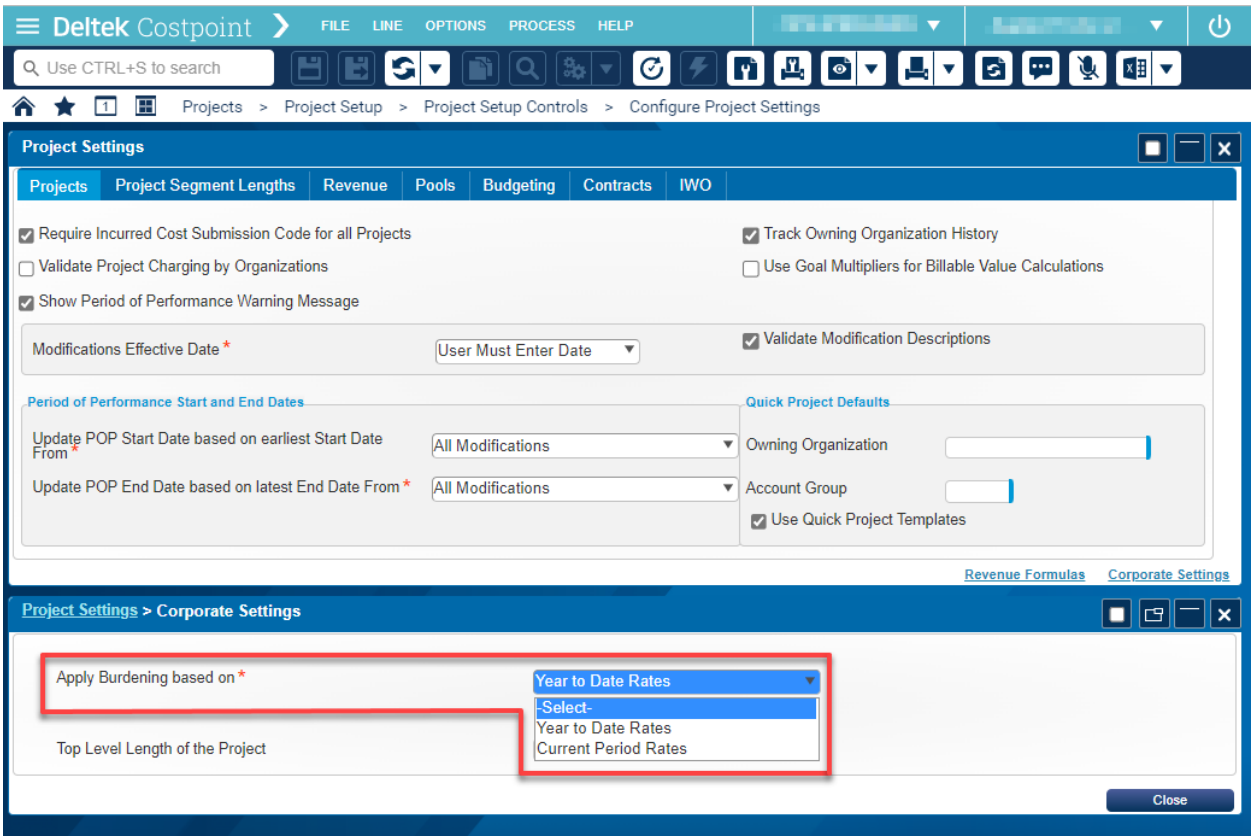
This screen's UI has been updated to give you a cleaner, more organized look of the available settings. Options are now divided into different tabs. The Contracts and IWO tabs are hidden if you are not licensed for the CRM & Contracts domain and the Inter-Company Work Orders module, respectively.



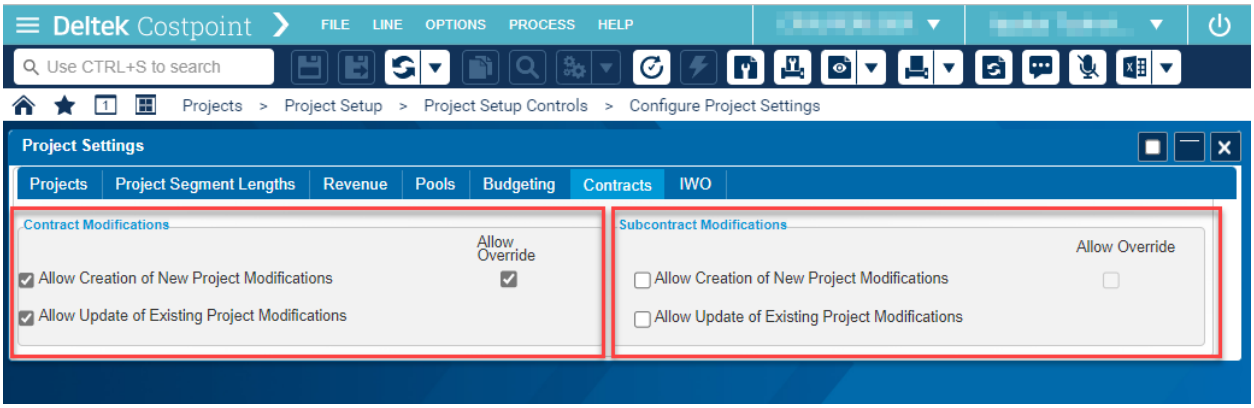
All control settings are the same as in Costpoint 8.1, except that some options previously displayed as radio buttons are now available in drop-down lists.

There are also no functionality or setting changes on the Revenue Formulas and Corporate Settings subtasks. Note, however, that both subtasks are available only on the Projects tab.

On the Corporate Settings subtask, the only UI improvement is the change of the **Apply Burdening based on** group box from radio buttons to a drop-down list.



On the Contracts tab, options for **Contract Modifications** are now separated from those for **Subcontract Modifications** to allow you to set up settings for contract modifications independent of the setup used in subcontracts. This can help you avoid issues as the two areas could have different processes.



The message that displays when you clear the **Allow Override** checkbox has also been updated to make it specific for contracts and subcontracts.

Intracompany Work Assignment Enhancements in Subcontractor Management

Updates were made to the following applications in the Subcontractor Management module to give you more flexibility in handling intracompany work assignments in Costpoint.

Manage Work Assignments (SMMWRK)

Changes were made to existing tabs and subtasks. New fields as well as a new tab and subtask are also now available.

Identification Group Box

New fields added to this area include the following.

Field	Description
Work Assignment Type	For new records, use this drop-down list to select from the following options: ▪ **Subcontractor Agreement**: Select this option if the work assignment will be used for subcontractor POs. ▪ **Subcontractor Agreement Intracompany**: Select this option if the work assignment will be used for intracompany subcontractor POs. Intracompany subcontractor POs allow the intracompany vendor (performing company) and its employees to view and update the work assignment created by the contracting company as well as charge the work assignment on their timesheets and expenses. Once you save the record, you can no longer edit this field. **Note:** If you have existing work assignment records and you upgrade to Costpoint 8.2, these records will automatically have the **Subcontractor Agreement** work assignment type.
Contracting Company Name	This defaults to the contracting company who created the work assignment record. In Form view, this field displays only if **Work Assignment Type** is **Subcontractor Agreement Intracompany** and is visible only to the performing company. In Table view, this field displays regardless of the work assignment type and whether the user is logged in to the contracting company or the performing company.

Only the contracting company can add or remove work assignment records on this screen. Performing companies, however, will be able to view these records and modify some fields through the new Manage Work Assignments (SPMSIWA) application added to the Supplier Portal module in the Materials domain. See Intracompany Work Assignment (IWA) Changes in Procurement for more information.

Basic Information Tab

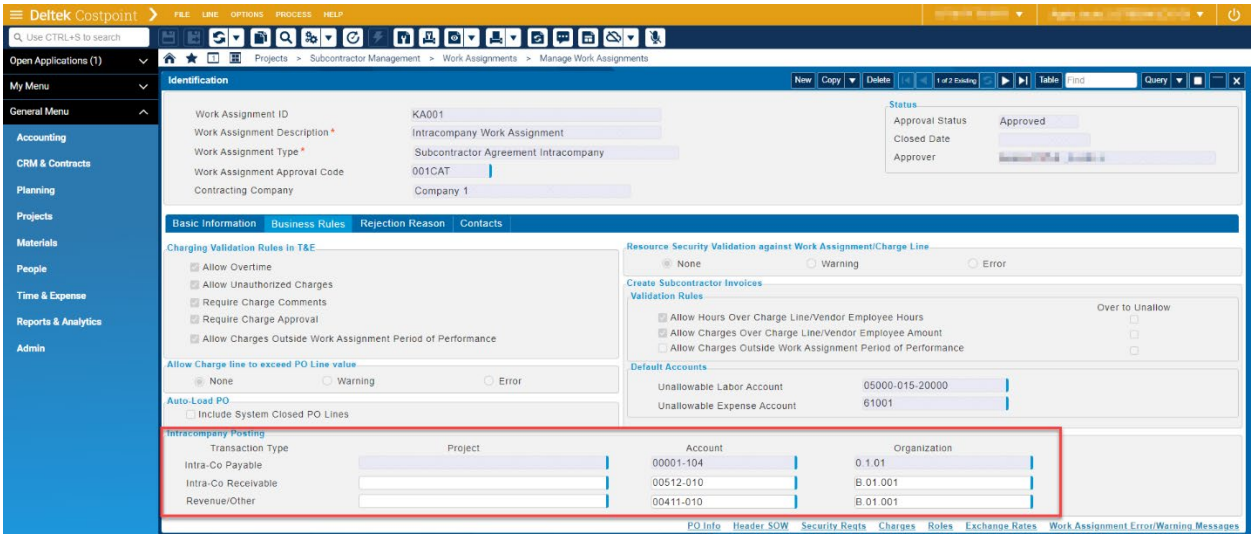
The **PO ID** field lookup has been updated based on the work assignment type.

- If **Work Assignment Type** is **Subcontractor Agreement**, the lookup displays only those POs with the **Intracompany Vendor** checkbox cleared on the Manage Purchase Orders screen.
- If **Work Assignment Type** is **Subcontractor Agreement Intracompany**, the lookup displays only those POs with the **Intracompany Vendor** checkbox selected in Manage Purchase Orders.

Business Rules Tab

The new **Intracompany Posting** group box on this tab allows the intracompany vendor to specify the project, account, and/or organization that the vendor will be using to receive the funds or the journal entry (JE) posting for performing the work or services for the contracting company. The contracting company can also use this group box to indicate the intracompany payable information.

This group box is enabled only if **Work Assignment Type** is set to **Subcontractor Agreement Intracompany** on the main screen of Manage Work Assignments.



For the performing company, the **Project**, **Account**, and **Organization** fields are enabled for **Intra-Co Receivable** and **Revenue/Other**. If fields in **Revenue/Other** are filled in, once the journal entry is posted, the JE goes directly to revenue, so no additional calculations are needed within the project/account/organization. The debit will be to the intracompany receivable, while credit will be to the revenue project/account/organization specified. Both the **Intra-Co Receivable** and **Revenue/Other** fields are required for the performing company. These are the accounts used when Costpoint generates the IWA JE. This is how the performing company receives the revenue and accounts receivable (AR) posting since the performing company does not actually create and post a billing invoice. This process also updates the SUBC_PROJ_BILL_HS record so the performing company has a way to view its intracompany billings.

For the contracting company, the **Project**, **Account**, and **Organization** fields are enabled only for **Intra-Co Payable**. Use these fields to indicate the project/account/organization that will be used to send the funds to the performing company.

Whether in the performing or contracting company, **Project** will be required only if the account is project-required. **Account** and **Organization** are both required fields.

Contacts Tab

Use this new tab to specify the email address of the contact persons from the performing and contracting companies. Fields included on this tab are:

- **Contracting Contact Email**: This field is visible only for the contracting company.
- **Performing Contact Email**: This field is visible only for the performing company.

Costpoint sends an email notification to these contact persons whenever changes or notes are added to the work assignment.

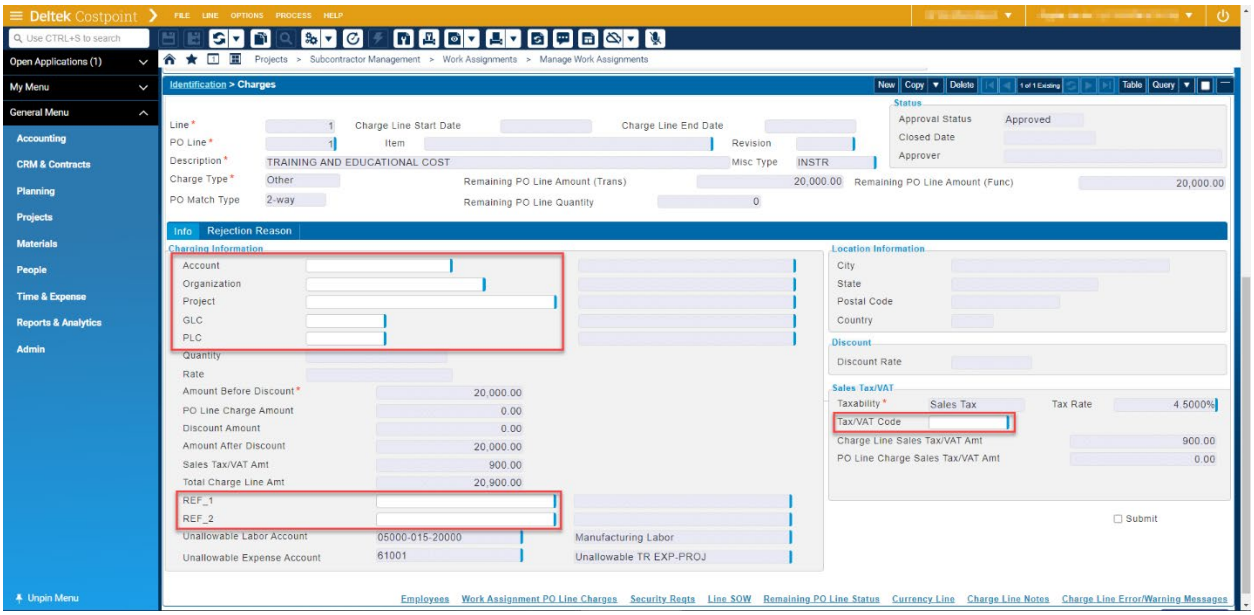
Charges Subtask

New fields added to this subtask include the following.

Field	Description
Submit	This checkbox is available only for the intracompany vendor. In Form view, this displays on the Info tab of the subtask. It cannot be modified for charge lines with a status of **Pending**, but the intracompany vendor will be able to see the charge line details. For **Approved** charge lines, the intracompany vendor can select or clear this checkbox. If this checkbox is selected, Costpoint displays this work assignment on the timesheet or expense report in Time & Expense, and the performing company employees will be able to put time and charges against the charge line. Note that when a work assignment is used in Time & Expense, changes can no longer be made to that work assignment's charge lines in the contracting company or in the performing company. If you select this checkbox, at least one record must exist on the Employees subtask of the Charges subtask.
Unallowable Labor Account	This defaults from the labor account on the Business Rules tab of Manage Work Assignments, if specified; otherwise, you must enter an account in this field.
Unallowable Labor Account Name	This field displays the labor account name.
Unallowable Expense Account	This defaults from the expense account on the Business Rules tab of Manage Work Assignments, if specified; otherwise, you must enter an account in this field.
Unallowable Expense Account Name	This field displays the expense account name.

Previously, only the **Unallowable Account** and **Unallowable Account Name** fields were included on this subtask.

Also in this release, intracompany vendors can edit the following fields on the Charges subtask.



Note that the **Tax/VAT Code** field is required in the intracompany vendor only if **Taxability** is set to **Sales Tax** and the contracting company has a value in **Tax/VAT Code**.

> **Note:** Although the intracompany vendor can edit several fields on this subtask, adding or deleting charge lines will not be allowed.

A new Employees subtask has also been added to the Charges subtask. Here, intracompany vendors can enter their employees who will be working on the intracompany work assignment. These records will be stored in the new WA_EMPL database table. Only the intracompany vendor can add, edit, and remove records on this subtask, but the contracting company will be able to view the records.

Additional rules that apply on the Employees subtask include the following:

- When new records are saved on this subtask for the intracompany vendor (performing company), Costpoint also saves those records as vendor employees for the contracting company (in the VEND_EMPL table).
- If the performing company removes an employee on this subtask, Costpoint does not delete the employee from VEND_EMPL table and instead sets it to **Inactive**.
- If the performing company adds back a previously deleted employee, the employee record's status is updated to **Active**.
- Only employees added to this subtask can charge the work assignment in their timesheet and expenses in Time & Expense. If an intracompany vendor employee is not assigned to any work assignment, that employee will not see the **Work Assignment ID** field/column in Time & Expense.

Approve Work Assignments (SMPWRKA)

The **Type** column has been added to the table window on this screen to display the work assignment type. Values can be **Subcontractor Agreement** or **Subcontractor Agreement Intracompany**.

As in existing functionality, if work assignment approval is required as set up on the Configure Subcontractor Management Settings screen, the contracting company uses this application to approve work assignments added through the Manage Work Assignments screen. If approval is not required, work

assignments and charge lines are automatically approved for new work assignment records created in Manage Work Assignments.

The intracompany vendor will not be able to approve work assignments on either screen but can mark approved charge lines as **Submit** on the Manage Work Assignments (SPMSIWA) screen in the Supplier Portal to enable employees assigned to work assignments to charge the work assignment in their timesheet and expenses.

View Work Assignment Status (SMQWA)

You can now display work assignment information on this screen based on the work assignment type. The **Type** group box has been added under **Selection Ranges** and lets you select one or both work assignment types when you execute this application.

On the Basic Information tab of the **Work Assignments** section, the following fields have been added, with values coming from the Manage Work Assignments screen:

- **Work Assignment Type**: This field displays **Subcontractor Agreement** or **Subcontractor Agreement Intracompany**.
- **Contracting Company**: This field displays the name of the contracting company that created the work assignment. In Form view, this field displays only if **Work Assignment Type** is **Subcontractor Agreement Intracompany** and is visible only to the performing company. In Table view, this field displays regardless of the work assignment type and whether the user is logged in to the contracting company or the performing company.

On the Business Rules tab, the **Intracompany Posting** group box has also been added, with values coming from the Business Rules tab in Manage Work Assignments.

On the Charges subtask, the new Employees subtask displays the employees from the performing company who will be working on the intracompany work assignment. Values also come from the Employees subtask of Manage Work Assignments.

Create Subcontractor Invoices (SMPINVC)

As in current functionality, this application creates subcontractor invoices based on data from work assignments and purchase orders. It pulls data from the Manage Open Subcontractor Detail screen and the subcontractor tables.

When you run this process in the contracting company, data pulled from these tables will include the performing company's hours/costs that were entered against the intracompany work assignment.

Manage Subcontractor Invoices (SMMMINVC)

Similar with Create Subcontractor Invoices, data being processed by this screen now also includes intracompany work assignments. If a user deletes an invoice or invoice line from this application, all related tables are updated so that Costpoint can pick up updated records when a new invoice is created.

Approve Subcontractor Invoices (SMMAINVC)

The following processes take place when you approve subcontractor invoices generated from intracompany work assignments.

In the contracting company:

- The PO voucher is created. Costpoint updates the PO voucher tables using the intracompany vendor ID and the intracompany payable account/organization/project from the work assignment.

- No journal entries will be created since the PO voucher will post to all the necessary accounts in the contracting company and intracompany payable account.

In the performing company:

- The IWA JE is created and posted to the intracompany receivable and revenue account/organization/project.
- Costpoint updates the subcontractor tables with the JE information and changes the **In Process** flag on transactions.
- Costpoint also updates the new billing history table, SUBC_PROJ_BILL_HS, which can store multiple work assignment and purchase order records.

Note: During month closing, you need to manually prepare the JE to clear intracompany payable and intracompany receivable accounts between the companies.

Print Subcontractor Invoices (SMRINVC)

This application now also prints invoices for intracompany work assignments.

Set Up Company (SYPCOMP)

When you create a new company by copying an existing company, this application copies the settings for the new **IWA** (Intracompany Work Assignment) journal entry type added to the Approvals Settings subtask of the Configure General Ledger Settings screen.

Multi-User Reports

This feature allows multiple users to post standard bills at the same time. It also enables simultaneous processing of standard bill reversals.

Both the Post Standard Bills and Reverse Previous Bills applications now have a **Place in queue** indicator that lets you know how many processes are ahead of you in the queue, and a **Run in background** link that you can click to run the process in the background. Each screen has a dedicated queue for interactive and background processing that you can view on the Manage Job Queues or View Action and Report Status screen.

For related features in other domains, see the following sections:

- Multi-User Report Printing in Accounting
- Single-to-Multi User Reports in Materials

Post Standard Bills (BLPGEN)

In this application, multiple users can now print, preview, or post standard bills at the same time. Note, however, that depending on the workstations or Costpoint instances being accessed and the projects/invoices being previewed, printed, or posted, some processes in the queue may or may not be allowed or are prioritized over other processes (see the table below).

Users will have only the option to **Print/Post Standard Bills** as the **Post Standard Bills** option is no longer available. The report generated from the Print/Post process will contain a unique sequencing number and should be retained if needed for historical purposes.

For printing or previewing bills, multiple users will be able to run the process regardless of the projects or invoices being posted. For a single user that is logged on in multiple workstations, on the other hand,

attempting to preview or print bills will result in an error, whether or not the same projects or invoices are being posted.

When running the print/post process, the result will depend on whether the same or different projects/invoices are being posted. This applies to multiple users as well as to a single user accessing different Costpoint instances.

The following table lists the common scenarios when running the Post Standard Bills application and their expected results.

No. of Users	Action	Result
Multiple users	Print preview, same projects/invoices	Allowed
Multiple users	Print preview, different projects/invoices	Allowed
Multiple users	Print only, same projects/invoices	Allowed
Multiple users	Print only, different projects/invoices	Allowed
Single user, logged on in multiple workstations (Costpoint instances)	Print preview, same or different projects/invoices	Error: “You are already working with it on another workstation.”
Single user, logged on in multiple workstations (Costpoint instances)	Print only, same or different projects/invoices	Error: “You are already working with it on another workstation.”
Multiple users	Print/post, same projects/invoices	Allowed, but only the first batch in the queue will be posted. For the second and succeeding postings, the process will complete, but no journal will be produced.
Multiple users	Print/post, different projects/invoices	Allowed. All batches in the queue will run and journals will be produced.
Single user, different Costpoint instances	Print/post, same projects/invoices	Allowed, but only the first batch in the queue will be posted. The second and succeeding batches will have nothing to post, and no journal will be produced.
Single user, different Costpoint instances	Print/post, different projects/invoices	Allowed. All batches in the queue will run and journals will be produced.

Reverse Previous Bills (BLPREVB)

On this screen, multiple users can now run the process at the same time.

The following table lists the common scenarios when running Reverse Previous Bills and their expected results.

No. of Users	Same or Different Invoices	Result
Multiple users	Same invoice	Allowed, but only the first invoice in the queue will be reversed. The others will return the following message: “There is no billing history data for the invoice or selected invoices exist.”
Multiple users	Different invoices	Allowed. Both will be processed through the queue.
Single user, different Costpoint instances	Same invoice	Allowed, but only the first invoice in the queue will be reversed. The others will return the following message: “There is no billing history data for the invoice or selected invoices exist.”
Single user, different Costpoint instances	Different invoices	Allowed. Both will be processed through the queue.

Performance Optimization

The following applications have been updated to process more efficiently and reduce their runtime during simultaneous or batch processing:

- Calculate Progress Payment Bills (BLPPROGP)
- Calculate Retroactive Bills (BLPRBIL)
- Calculate Standard Bills (BLPGBILL)
- Post Standard Bills (BLPGEN)
- Reverse Previous Bills (BLPREVB)

Pool Rate Validation for Compute Burden Costs and Compute/Print Pool Rates

Compute Burden Costs (PJPALCST)

Compute Burden Costs has been updated to process more efficiently and find problem pools quickly. If Costpoint identifies any problems, the application will display an error message showing the pools with errors and their respective rate types and values and then terminate the process. This enhancement prevents the arithmetic overflow error resulting from problem pools, which may require a lengthy resolution.

A sample error message looks like this:

The pools listed below have rates that create an arithmetic overflow error. Please correct these issues or do not run these specific pools:

Pool: 1, Current Period Rate: 9.99999999, YTD Rate: -9.99999999

Pool: 5, Current Period Rate: 9.99111111, YTD Rate: -9.99111111

Note: Costpoint looks at the current period (**Pd Actual**) and year-to-date (**YTD Actual**) rate values on the Pool Rates subtask of Manage Cost Pools to identify records that may cause an arithmetic overflow error.

To fix this, you can modify the pools/rates in Manage Cost Pools and then rerun Compute Burden Costs.

Complete these steps:

1. Go to the Manage Cost Pools screen.
2. On the main screen, select the pool that throws an error.
3. On the Pool Rates subtask, replace the entries in the **Pd Actual** and/or **YTD Actual** fields with the correct rate values.
4. Repeat steps 2 and 3 for the other affected pool(s).
5. Save your changes.
6. Run the Build Rate Application Table screen.
7. Run the Compute Burden Costs screen.

Compute/Print Pool Rates (PJPCOMPP)

When you run this application and it calculated pool rates that may cause an arithmetic overflow error, Costpoint throws an information message detailing the problem pool and its corresponding rate types and values.

You can choose to exclude problem pools when you rerun Compute/Print Pool Rates, or you can correct the issue by doing any of the following:

- Post costs to either the cost or base of the pool.
- Change the pool cost to include the correct account/organization combinations.
- Change the pool base to include the correct account/organization combinations.

For more information on these methods, see Procedures in Fixing Pool Rate Issue in the online help of Compute/Print Pool Rates.

Month End Processes (PJPMENDP), Compute Revenue Processes (PJPREVP), Reporting Processes (PJPREPTP), and Cost Pool Processes (PJPPOOLP)

These applications run multiple processes in Costpoint, including the Compute Burden Costs and/or Compute/Print Pool Rates screen. As such, they have also been updated to throw the same message displayed on those two screens to indicate problem pools.

The same procedures in solving the issue also apply. Refer to the online help of Compute Burden Costs or Compute/Print Pool Rates for the detailed steps.

View Action and Report Status (SYQJSTAT)

When you run Compute Burden Costs or Compute/Print Pool Rates in batch mode, the View Action and Report Status screen now displays in the **Application Status** field the message relating to the arithmetic overflow error. The email notifications sent to the user will also contain the same information.

Once the batch job completes and Costpoint encounters the said error, the **Status** field on the View Action and Report Status screen will be updated to **Completed** (for Compute/Print Pool Rates) or **Failed** (for Compute Burden Costs). You can apply the resolutions detailed above to fix the issue in those applications.

Put Transactions On Hold for a Specific Time

This feature allows you to mark a transaction in Manage Open Billing Detail to be on hold to help you facilitate the bill generation process and eliminate manual data entry. In addition, you can put transactions on hold until a specific date, so you do not need to revisit the record to bill the transactions in the future.

Manage Open Billing Detail (BLMOPEN)

On this screen, the following items have been added:

- **Hold**: Click this button to put the entire transaction on hold. When you click this button, Costpoint copies the **Transaction Amount**, **Transaction Hours**, and **Transaction Units** values into the **Amount on Hold**, **Hours on Hold**, and **Units on Hold** fields, respectively. This eliminates the need for manually entering the on-hold values, but you can modify these values as necessary.

  If the transaction has been partially billed, the on-hold amount/hours/units will be net of the partially billed amount/hours/units.

- **Release Date**: Enter or select the date until which the amount/hours/units specified should be put on hold. This field can be blank, but you have to access and edit the record again if you no longer want to defer the on-hold amount/hours/units from billing calculations.

  If the date you entered is outside of the record's period of performance, Costpoint displays an error message.

Calculate Standard Bills (BLPGBILL)

This application considers the new **Release Date** field added to Manage Open Billing Detail. When the **Auto-Release On-Hold Items** checkbox is selected in Calculate Standard Bills, the system will release all transactions with a blank release date and all those with a release date prior to or equal to the subperiod end date of the billing calculation. When releasing the transactions on hold, Costpoint will clear the transactions' release date.

If **Auto-Release On-Hold Items** is selected but the transaction's release date is after the subperiod end date of the billing calculation, the on-hold values as well as the release date will remain. Also, the on-hold hours, units, and amounts will not be pulled into the billing calculation at that time.

Print Open Billing Detail Report (BLROBD)

The **Status** column heading in the Open Billing Detail Report has been updated to **Status / Release Dt** to include the **Release Date** value from the Manage Open Billing Detail screen. This date is displayed as mm/dd/yy (for example, a **Release Date** of June 12, 2022 is displayed as **06/12/22**).

Existing functionality already displays if the transaction amounts/hours/units are on hold. **H** is indicated under the **Status / Release Dt** column.

Track Previously Reversed Bills

Reverse Previous Bills has been updated to display an information message when you try to reverse an invoice that has already been reversed. This is to prevent or warn you from completing the reversal more than once.

To check if an invoice is already reversed, Costpoint compares the new invoice number to the stored original invoice number. If the new invoice number does not match the original, then Costpoint displays the information message together with the new invoice number that was assigned with the reversal.

The new message looks like this:

There is no billing history data for the invoice or selected invoices exist. Invoice INV-1234-567890 has already been reversed. The new invoice number is INV-1234-567892.

Display of the said message depends on whether the **Assign new invoice ID** checkbox was selected on the Reverse Previous Bills screen when the invoice was reversed:

- If the checkbox was **not** selected when the original invoice was reversed, then the reversed bill has the same invoice number. When you try to reverse the original invoice again, Costpoint displays the following message:

  There is no billing history data for the invoice or selected invoices exist.

- If the checkbox was selected when the original invoice was reversed, a new invoice number is assigned to the reversed bill. When you try to reverse the original invoice again, Costpoint displays the more detailed information message:

  There is no billing history data for the invoice or selected invoices exist. Invoice INV-1234-567890 has already been reversed. The new invoice number is INV-1234-567892.

Note: Deltek recommends that you select the **Assign new invoice ID** checkbox when reversing bills if you are using inter-company work order (IWO) allocations to prevent problems on the Create IWO Allocations screen.

The following applications have also been modified for this enhancement:

- **Manage Standard Bills (BLMGBILL)**: The **Original Invoice Number** field has been added to the Standard Billing Info tab of this screen. It displays the original invoice number that was reversed, given that the **Assign new invoice ID** checkbox was selected in Reverse Previous Bills at the time of the reversal. You can now also query records on the screen based on the value of this new field.

  In Form view, this field displays only for bills with a status of **Reverse** and have a new invoice ID. In Table view, this field displays for all records and may be blank.

- **Print Billing Worksheet (BLRBILLW)**: The Billing Worksheet now includes the **Original Invoice Number** information for reversed bills that have a new invoice ID. This field does not display when no new invoice ID is assigned to the invoice when you reversed the bill (that is, **Assign new invoice ID** was not selected in Reverse Previous Bills).

- **Print Billing Register (BLRBREG)**: If the **Print Bill Number on Report** checkbox is not selected on this screen, the **Original Invoice Number** column will now be displayed on the Billing Register. If that checkbox is selected, the column will display both the bill and original invoice numbers and will be labeled as **Bill # / Original Invoice Number**.

Using Modification Effective Date in Calculating Standard Bills

Costpoint has updated its logic in calculating standard bills by taking into account the modification effective date in the computation. This is to prevent total value, cost, and fee ceilings from being released early in case future funding modifications are entered, and consequently avoid having incorrect invoices and issues with Unbilled Analysis.

Both the Calculate Standard Bills (BLPGBILL) and Calculate Retroactive Bills (BLPRBIL) applications have been modified to look at the modification effective date in computing bills: that is, any modifications with an **effective date earlier than or equal to the subperiod ending date** specified on these screens will be included in the total modification amounts. The modification amounts will be included in the total value, cost, and fee fields. Ceilings will be evaluated based on the modification values with effective dates.

Warning: Review your modification effective dates to ensure your contract values are correct. You can modify the effective dates on the Manage Modifications screen and then recalculate the bill.

The following applications have also been updated for this enhancement:

- **Print Standard Bills (BLRMBIL)**: The printed bill now displays only modifications with an effective date earlier than or equal to the subperiod ending date specified on the Calculate Standard Bills or Calculate Retroactive Bills screen. Amounts printed do not include future modifications.
- **Print Billing Worksheet (BLRBILLW)**: Changes to this application include the following:
  - Modifications displayed on the worksheet are only those with an effective date earlier than or equal to the subperiod ending date specified on this screen. Amounts printed do not include future modifications.
  - The **Total Value (All Mods)** column header has been renamed to **Total Value (w/o Future Mods)**.
  - The **Total Funded (All Mods)** column header has been renamed to **Total Funded (w/o Future Mods)**.

Materials

This section describes Costpoint 8.2 enhancements for the Materials domain.

Return Material Authorization Functionality

This enhancement handles the return process, from receiving and inspecting the customer material to processing the refund or shipment back to the customer either as a replacement or repair. When a customer needs to return a material, the new Manage Customer Returns application will be used to start the process. In this new application, the user will be able to decide whether the returned material requires a replacement, repair, or refund. An email notification can also be sent to the customer indicating the return information. After an RMA ID is generated from the Manage Customer Returns screen, returned materials will be received in Manage Purchase Order Receipts and inspected in Manage Quality Control Inspections. If you are using Sales Order Entry and the materials received are to be replaced, a new sales order will need to be created in Manage Sales Orders. If it requires a refund, then a negative sales order invoice will need to be created in Manage Invoices. If it requires a refund, then a negative sales order invoice will need to be created in Manage Sales Orders. If Sales Order Entry is not used, then the replacement and refund will need to be processed using an alternative sales order process. If the return needs a repair, a purchase order or manufacturing order will be created depending on whether the repair will be done externally or internally.

The following are the changes to the applications.

Configure Customer Return Settings (OEMCRSET)

This new application (**Materials » Sales Order Entry » Sales Order Entry Controls » Configure Customer Return Settings**) enables you to set rules and defaults that will apply to Return Material Authorization (RMA) created for customer returns.

Set Up Company (SYPCOMP)

The application now copies values for the new options in RMA Settings from the original company when creating a new company by copying values from an existing company.

Manage Customer Return Reasons (OEMCRRSN)

This new application (**Materials » Sales Order Entry » Sales Order Entry Controls » Manage Customer Returns Reasons**) allows you to enter user-defined reasons for customer returns.

Manage Customer Returns (OEMCRTRN)

This new application (**Materials » Sales Order Entry » Customer Returns » Manage Customer Returns Reasons**) allows you to enter a Return Material Authorization (RMA) for customer returns. To create customer returns, use the Manage Customer Returns screen. If the material being returned was initially issued out on a sales order, you can enter the original sales order ID, invoice number, and/or customer purchase order number to default the data. Otherwise, you can key in the items being returned. You also need to enter the customer ID and address, employee ID, return quantity and reason, as well as the order payment disposition, which is used to identify how to handle the returned material.

Manage Sales Orders (OEMNTSO1)

The application now allows you to create a new sales order and send the customer a replacement for a part returned via the Return Material Authorization (RMA).

The same change applies to the Manage Sales Orders Supervisor Screen (OEMNTSO2).

Approve Sales Orders (OEMAPPSO)

The following are the changes to the application:

- Two new fields, **RMA** and **RMA Line**, have been added to the SO header and SO line to display the RMA and RMA line references.
- A new subtask, Customer Returns subtask, has been added to display basic information related to the customer return.
- Logic to support replacement sales orders for RMA lines when approvals are required has been added.

The same changes apply to the View Sales Order Status Information (OEQSTAT) screen.

Manage Sales Order Inventory Issues (OEMISSU1)

The following are the changes to the application:

- Inventory issues from RMA-type locations are now allowed depending on the following conditions:
  - If the SO line has an RMA reference with an RMA line Order/Payment Disposition Resolution of Repair Internal or Repair External, inventory issue from RMA Accepted and RMA Rejected type locations only is allowed.
  - If the SO line has an RMA reference with an RMA line status of Order/Payment Disposition Resolution of Replace Now or Replace on Return, inventory issue from regular locations (On-Hand, Shipping, Reinspection) is allowed based on current application logic.
  - If the SO line does not have an RMA reference, inventory issue from regular locations (On-Hand, Shipping, Reinspection) is allowed based on current application logic.
- Two new fields, **RMA** and **RMA Line**, have been added to the SO header and SO line to display the RMA and RMA line references.

Manage Sales Order Non-Inventory Issues (OEMISSU2)

Two new fields, **RMA** and **RMA Line**, have been added to the SO header and SO line to display the RMA and RMA line references.

Manage Invoices (OEMINVC1)

If a customer return requires a refund, you can now use this application to create a new sales order invoice for refunding the customer based on returned material information in a Return Material Authorization (RMA). Refunds against RMA lines without a sales order reference should be done manually using the Manage Manual Bills (BLMMNBIL) application in Projects/Billing/Manual Bills Processing.

In addition, two new fields, **RMA** and **RMA Line**, have been added to the header and line to display the RMA and RMA line references.

The same changes apply to the Manage Invoices Supervisor Screen (OEMINVC2) screen.

Create Invoices (OEPINVC)

Use the new **Create Customer Return Refunds** checkbox to create negative invoices for sales order lines that are eligible for a customer return RMA refund. This option is available only if the selection

criteria is Sales Order or Customer. The application finds eligible RMA lines associated with the sales orders within the selected range and creates negative invoices for refund to the customer. When you print a report, an RMA and RMA line information will be added to the report.

View Customer Returns Status (OEQCRTRN)

This new inquiry screen (**Materials » Sales Order Entry » Customer Returns » View Customer Returns Status**) allows you to view the details of the customer return. This application also allows you to filter data by customer, RMA ID, original sales order ID, project, item, and RMA status. Any receipts, purchase orders, manufacturing orders, sales orders, and serial lot information can also be viewed on this screen.

Manage Purchase Orders (POMMAIN)

The application has been updated to store a new PO Type, that is, RMA-type purchase order. This new PO Type is automatically created when **Material Return Required** is selected for a Return Material Authorization (RMA) for customer return. Users are prevented from creating, editing, or viewing RMA type purchase orders.

Two new fields, **RMA** and **RMA Line**, have been added to the PO header and line to enter the RMA and RMA line references when creating a regular purchase order line(s) for rework or external repair of a returned part.

Create Purchase Order Change Orders (POMCHNG)

The application has been updated to prevent users from creating change orders for RMA-type purchase orders.

This application will now copy the reference RMA and RMA Line to the PO change order.

Manage Purchase Order Expediting Notes (POMEXPN)

The application has been updated to prevent users from adding expediting notes to RMA-type purchase orders.

Print Purchase Order Activity Report (PORACTV)

The application has been updated to exclude RMA-type purchase orders from activity calculations.

View Item Purchasing Information (POQITEM)

The application has been updated to exclude RMA-type purchase orders from loading when you select **Execute** from the Action Menu.

Create PO Vouchers from POs/Receipts (POPPOVCH)

The application has been updated to prevent the creation of PO vouchers for RMA-type purchase orders.

Manage Purchase Order Vouchers (POMPOVCH)

The application has been updated to prevent users from creating, editing, or viewing PO vouchers for RMA-type purchase orders.

Create Debit Memos (POPDM)

The application has been updated to prevent the creation of debit memos for RMA-type purchase orders from loading when you select **Execute** from the Action Menu (or Query).

Archive Purchase Orders (POPARCH)

The application now excludes RMA-type purchase orders from the archiving process.

Reconcile Purchase Orders (POPRECON)

The application has been updated to prevent reconciliation of RMA-type purchase orders.

Buyer Dashboard (PODBUYER)

The application has been updated to exclude PO lines (or delivery lines) from RMA-type purchase orders in the calculation of dash part information.

Manage Buyer Actions (POMBACT)

The application has been updated to exclude the loading of PO lines (or delivery lines) from RMA-type purchase orders.

Import Purchase Orders (AOPUTLPO)

The application has been updated to exclude RMA-type purchase orders. Costpoint generates an error message if an RMA PO type or changes to an RMA PO type are specified in the input file.

Import Purchase Order Vouchers (AOPPOVCH)

The application has been updated to exclude RMA-type purchase orders when creating PO vouchers.

Manage Purchase Order Receipts (RCMPORC)

The application now allows you to receive customer-returned materials to the seller's warehouse. You can enter receipts for an RMA by entering the RMA ID or the RMA PO ID associated with the RMA, and you can use multiple receipts, similar to regular POs.

Manage Quality Control Inspections (RCMINSP)

You can use this application to inspect customer-returned material received into the warehouse via the Manage Purchase Order Receipts screen. In addition, the following new fields have been added:

- **RMA**: Use this field to view the RMA ID associated with the PO.
- **RMA Line**: Use this field to view the RMA line ID.
- **Internal Notes**: Use this field to display the internal notes on the PO line.

Print Receipt Traveler (RCRTRVLR)

The application prints the RMA ID corresponding to the RMA purchase order (PO).

Manage Vendor Returns (RCMRTRN)

The application filters the lookup on the PO number field (header and line) and validates newly entered POs of RMA type.

Enter Miscellaneous Inventory Receipts (RCMMSRC)

The application has been updated to prevent miscellaneous receipts from using RMA-type locations. On the header and line, the default location and receipt location lookups exclude RMA-type locations.

Manage Locations (INMWHSEL)

Three new location types have been added.

- RMA Received: Use this location type to receive customer-returned material into the warehouse. This keeps the material segregated from the existing Incoming Inspection location type.
- RMA Accepted: Use this location type when customer-returned material is deemed acceptable. This keeps the material segregated from the existing On-Hand or Shipping location type.
- RMA Rejected: Use this location type when customer-returned material is rejected. This keeps the material segregated from the existing Reinspection, MRB, or On-Hold location type.

Manage Warehouses (INMWHSE)

A new **RMA PO Default Locations** group box has been added to the screen. Use this group box to indicate locations for returned material received, accepted, or rejected. These default locations are used during receiving and inspection of the returned material; only RMA-type locations are allowed in these RMA default locations.

Enter Location Transfers (INMLOXFR)

The application now allows you to do the following:

- Transfer material out of RMA-type locations (RMA Accepted and RMA Rejected) in order to move materials to a regular inventory location or to another RMA location of the same type.
- Prevent the update, which also prevents the transfer of material from a non-RMA-type location to an RMA-type location.
- Select RMA-type locations for the warehouse from the Lookup in the **From** and **To** group boxes.

Enter Inventory Transfers (INMPAXFR)

The application now allows you to do the following:

- Transfer returned material from one inventory abbreviation to another.
- Transfer material out of the RMA-type locations (RMA Accepted and RMA Rejected) in order to move the material to a regular inventory location or to another RMA location of the same type.
- Prevent transfer of material from a non-RMA-type location to an RMA-type location.
- Select RMA Accepted or RMA Rejected type location for the warehouse.

RMA locations can be used only for Standard transfer types and not for Borrow or Payback transfer type.

Create Mass Inventory Transfers (INPMSXFR)

Two new checkboxes have been added to the application:

- **RMA Accepted**
- **RMA Rejected**

Use these checkboxes to transfer material from all locations of the selected type with matching screen selection for warehouse and inventory abbreviation (From).

Manage PO/Req Inventory Reservations (INMPORSV)

The updated application prevents the creation of reservations against RMA-type purchase orders (PO).

> **Tip:** Issues from RMA locations are allowed for repairing the customer-returned parts via manufacturing orders (internal rework) or POs (external rework).

Enter Quantity Adjustments (INMQTADJ)

You can manually adjust returned material in RMA-type locations in order to correct inventory discrepancies. However, cost adjustments are not allowed for RMA inventory.

Enter Scrap Adjustments (INMSCADJ)

You can manually adjust scraps of returned materials in RMA-type locations in order to correct inventory discrepancies. However, cost adjustments are not allowed for RMA inventory.

Create Physical Counts (INPPHYS)

You can now create standard physical counts for quantities in RMA-type locations in order to correct inventory discrepancies.

Manage Physical Counts (INMPCLST)

You can now add new count rows for quantities in RMA-type locations in order to correct inventory discrepancies.

Create Physical Count Adjustments (INPPCDSC)

The application has been updated to support the updates related to standard physical counts for RMA-type locations; any adjustments made updates the corresponding RMA-type locations in inventory.

Enter Issues to Project/Account/Org or PO (INMPAISS)

Two new fields have been added to display the RMA and RMA Line associated with the purchase order. In addition, the application now:

- Allows issues to PO from RMA-type locations if the PO has an RMA reference.
- Prevents issues to PO from RMA-type location if the PO does not have an RMA reference.
- Allows issues to PAO from RMA-type locations.
- Prevents issuing from RMA Received type location.

Print Stock Status Report (INRISTS)

You can now print stock status for customer-returned materials stored in RMA-type locations. New options in the **Select Inventory Types** group box allow you to print stock status from RMA Received, RMA Accepted, and RMA Rejected type locations.

However, if you select the **Show Only Recognized Inventory** checkbox, Costpoint excludes RMA-type locations from the inventory report. If you selected the three new checkboxes for RMA-type locations prior to selecting the **Show Only Recognized Inventory** checkbox, the RMA options will be cleared and disabled.

View Part Inventory (INQPINV)

Several new fields have been added to include customer-returned RMA inventory information.

- **Include RMA Inventory**: Use this checkbox to view customer-returned material inventory in RMA-type locations.
- **RMA Received Qty**: Use this field to display the customer-returned quantity in the RMA Received type location.
- **RMA Accepted Qty**: Use this field to display the customer-returned quantity in the RMA Accepted type location.
- **RMA Rejected Qty**: Use this field to display the customer-returned quantity in the RMA Rejected type location.

A new tab, RMA Inventory, has also been added to the Inv Abbrev and Sub Parts subtasks to display the customer-returned quantity in the RMA-type locations. This tab is hidden if the **Include RMA Inventory** checkbox is not selected. On the Inv POs and Non-Inv POs subtasks, RMA PO types are excluded from being displayed; The opposite is true on the Proj Loc and Part Locations subtasks.

Reconcile Inventory Balances (INPRECON)

RMA-type location quantities are now included when you reconcile using the following options:

- Inv Summary Qty to Location Detail Qty
- Inv Summary and Detail Qty to Transaction Detail
- On Order Quantity
- Reconcile Average Cost

When you run the report, the report displays an asterisk when a material is in an RMA Received type location and the serial/lot assignment is Acceptance.

Import Inventory Transactions (AOPINTRN)

The application follows the following logic:

- Issue to PAO (Project/Account/Org)
  - Allows inventory issue to PAO from RMA-type location
  - Prevents issuing from RMA Received type location
- Issue to MO
  - Prevents issue from RMA location if MO does not have RMA reference

  - Prevents issue from RMA location if MO has an RMA reference, but issued component is not RMA part to be repaired
  - Allows issue to MO with RMA reference, only if the associated RMA/RMA line has a status of Ready for Int Repair
- For Location Transfers:
  - Prevent transfer from non-RMA location to RMA location
  - Prevent transfer from RMA Accepted to RMA Rejected location type
  - Prevent transfer from/to RMA Received location type

Manage Manufacturing Orders (PCMMOMNT)

The application has been updated to allow rework-type manufacturing orders (MOs) for repairing the part returned by the customer via Return Material Authorization (RMA).

The following new fields have been added as well:

- **RMA**: Use this field to enter the RMA ID of the customer return for which you are creating this repair (MO.
- **RMA Line**: Use this field to enter the RMA line number for which this repair MO is being created.
- **RMA Accepted Qty**: (Requirements Subtask) This field displays the customer-returned quantity that is currently in the RMA Accepted type location for the corresponding inventory abbreviation. This field is hidden if the MO does not have an RMA reference.
- **RMA Rejected Qty**: (Requirements Subtask) This field displays the customer-returned quantity that is currently in the RMA Reject type location for the corresponding inventory abbreviation. This field is hidden if the MO does not have an RMA reference.

The above changes apply to the Expedite Manufacturing Orders (PCMMEXPD) screen, with the addition of the logic that excludes customer return repair POs/MOs with RMA reference.

Enter Manufacturing Order Issues (PCMMOISS)

The application has been updated to prevent the issuance of MOs from RMA-type locations for non-RMA rework MOs, but allows it for MOs for repair (Ready for Int Repair) via Return Material Authorization (RMA).

The following fields have also been added:

- **RMA**: This field displays the RMA ID of the customer return referenced in the repair MO.
- **RMA Line**: This field displays the RMA line number reference in this repair MO.

Enter Manufacturing Order Reliefs (PCMRELMO)

The application has been updated to prevent MO relief to RMA-type locations for non-RMA rework MOs.

The following fields have also been added:

- **RMA**: This field displays the RMA ID of the customer return referenced in the repair MO.
- **RMA Line**: This field displays the RMA line number reference in this repair MO.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

The application has been updated to support the RMA enhancement and prevent RMA PO type to be entered in the PO field of the Assign PO Defaults tab, Assign PO subtask, and Assign PO-Combined subtask. The same changes apply to the Apply PO Info to Purchase Requisitions by Line (PPMRQLN) screen.

Compute Vendor Performance (PPPVNDP)

When you retrieve PO receipt records that meet the screen parameters you entered, the application will exclude RMA PO types.

Update Material Requirements Plan (MRPMRP)

When you create schedule receipt rows for purchase order lines, the application will exclude RMA PO types as supply. The same change applies to the Update Master Production Schedules (MSPMPS) screen.

Manage Detailed Part Schedule (MRMDTPT)

When you view supply from purchase orders, the application will exclude RMA PO types.

Manage Parts (PDMPART)

In the **Default Location** field of the Planning subtask and **Preferred Location** field of the Project Requirements subtask, the application validation disallows RMA-type locations.

Manage Part Project Data (PDMPRJPD)

The application validation disallows RMA-type locations in the **Preferred Location** field.

Manage Manufacturing Bills of Material (BMMMBOM1)

The application validation disallows RMA-type locations in the **Location** field of the MBOM Line. The same validation applies to the Release Manufacturing Bills of Material (BMMMBOM2).

Manage Engineering Change Notices (ECMECN)

In the **Location** field of the MBOM Components subtask, the application validation disallows RMA-type locations for referenced warehouses.

Manage Supplier Actions (SPMSPACT)

The application has been updated to prevent users from editing or viewing RMA-type purchase orders.

Supplier Portal Dashboard (SPDSP)

The application excludes RMA-type purchase orders from the calculations and display of results in all dashparts.

Create Requisition Delivery Schedule

Multiple planned orders with similar criteria are combined into a single requisition line with multiple delivery schedule rows in Firm MRP Planned Orders and Firm MPS Planned Order based on a due date window setting. The same functionality has been implemented in Compute Material Requirements and when creating requisitions from sales orders.

Configure Purchase Requisition Settings (PPMRQSET)

A new **Requisition Processing** group box has been added to the screen to accommodate the use of delivery schedules for generated requisitions. This group box includes a **Use Delivery Schedule** checkbox and **Due Date** field. When Planned Orders are firmed by MRP, MPS, or via Compute Material Requirements, and the part and inventory abbreviation are the same but have different due dates, the requisition will be generated with a single line that has a delivery schedule instead of multiple requisition lines for each due date. The value entered in the **Due Date** field determines the range of requisition line due dates that will be combined into a delivery schedule. For example, if the due date window is set to 30 days, all of the same item revisions that have different due dates in the 30-day window will be generated as a delivery schedule for that requisition line.

Set Up Company (SYPCOMP)

The application now copies new requisition setting values when creating a new company based on an existing one.

Firm Material Requirements Planning Planned Orders (MRPFPO)

On the Firm Material Requirements Planning Planned Orders and Firm Master Production Schedule Planned Orders screens, new logic has been added to combine planned orders with due dates within the specified due date window into a single requisition line with multiple delivery dates. Also, the Create Purchase Orders report now includes a column that indicates which requisition lines contain a delivery schedule.

Compute Material Requirements (PCPMRR)

New logic has been added to combine required quantities for End Parts and exploded multi-level components with Need Dates within the specified due date window into a single requisition line with multiple delivery dates. The Material Requirements report also includes the column that indicates which requisition lines contain a delivery schedule.

Address in Ship ID Lookup

This feature allows you to see the full **Ship To** address fields in the Ship ID lookup on all screens where the Ship ID exists and eliminates the need to navigate to customer screens to see the details. This also allows consistency with other address lookups, like **Bill To** and **Remit To**, which contain the address information. The Ship ID Info (i) lookup was also added to the Sales Order Line Shipping tab in Approve Sales Orders for visibility into the **Ship To Address** information.

This feature affects the following screens:

- Manage Simple Purchase Requisitions (PPMQREQ)
- Manage Purchase Requisitions (PPMNTRQ1)
- Apply PO Info to Purchase Requisitions (PPMNTRQ2)

- Apply PO Info to Purchase Requisitions by Line (PPMRQLN)
- Manage Request for Quotes by Item (PPMRFQI)
- Manage Request for Quotes by Vendor (PPMRFQV)
- Manage Vendor Quotes by Item (PPMQTI)
- Manage Vendor Quotes by Vendor (PPMQTV)
- Manage Vendor Quote Types (PPMQTTYP)
- Manage Purchase Orders (POMMAIN)
- Create Blanket Purchase Order Releases (POMRELS)
- Export eProcurement Addresses (AOPEPAD)
- Configure Purchasing Settings (POMSET)
- Create MO Subcontractor Requisitions (PCMSCRQ)
- Manage Sales Orders (OEMNTSO1)
- Manage Sales Orders Supervisor Screen (OEMNTSO2)
- Create Purchase Requisitions from Sales Orders (OEPGRQ)
- Manage Sales Order Inventory Issues (OEMISSU1)
- Manage Sales Order Non-Inventory Issues (OEMISSU2)
- Manage Shipping Transactions (OEMSHIP)
- Manage Sales Order Inventory Issues (INMISSU1)
- Manage Proposals (MEMPROP)
- Approve Sales Orders (OEMAPPSO)

Costpoint Business Intelligence (BI) Enhancements

BI enhancements consist of the following sub-features.

Inventory Dashboard

Users can access an Inventory dashboard that aids them in analyzing data and making better business decisions on inventory value, obsolete inventory levels, negative available inventory, and count accuracy.

NAICS Code and Business Size

Users can print the purchase order (PO) header NAICS code and business size in the BI Purchase Order report.

Purchase Order Report

Users can print the Vendor UEI number, DPAS Rating, and Contract Number on the purchase order (PO) report and also flow down FAR/DFAR clauses from the subcontract.

Buyer Group Data

This enhancement allows users to access the Buyer Groups in the following BI reports and dashboards:

- **BOM Component Shortage Report**: This report allows users to see inventory levels and where items are needed to build a BOM assembly.
- **Container Content Labels**: This feature allows users to print barcoded labels for each Inventory Transaction Line where inventory is being put away.
- **Customer Return Report**: This report allows users to see a list of Customer Return lines that can be filtered by Part or Project, providing analysis of returned material to help understand where action is needed.
- **Lead Time Audit Report**: This report allows users to easily see and manage a list of item lead times that are setup in Manage Parts. It also shows the MOs and POs that make up that lead time.
- **Lead Time Import Extraction Report**: This report allows users to extract the part list with current lead time information in the Import Parts file format. Running this report in Excel allows for easy updates to lead time information that can be imported back into Costpoint to update lead time data.

NAICS Code Updates

Users can now set the NAICS Code and Business Size based on the majority of the order with the addition of a **Business Size** field to the purchase order (PO) header. This Business Size will default from the Vendor NAICS code if it is set as small business, or it will default from the vendor classification business size. The Small Business Administration (SBA) size standard information will then print on the PO if the **Business Size** field is set to small and the user chooses to print the NAICS information.

In addition, this change also updated the PO line business size defaulting logic to also default from the vendor NAICS Code if set as a small business. If the user did not enter a NAICS code, or the NAICS code is not set to small business or is not linked to the vendor, the Business Size will default from the vendor classification.

Manage Purchase Orders (POMMAIN)

The following are the changes to the application:

- A new **Business Size** field in the header section allows you to select the size option to classify the vendor. When you enter/select a NAICS Code that matches any of the vendor NAICS code entry, the business size will default to the business size associated with the NAICS Code.
- The **Business Size** field on the PO line displays a pre-existing value that is associated with the NAICS code you entered or selected.
- If there is no NAICS Code nor Industry Class, the business size is equal to the vendor business size that you entered.

Note: The user is responsible for ensuring that the business size at the header and line are consistent with the business size defined in the vendor NAICS Code, especially when using the **Small** business size.

Create Blanket Purchase Order Releases (POMRELS)

New fields have been added on the PO header and line to display the vendor **NAICS Code** and **Business Size**.

Create Purchase Order Change Orders (POMCHNG)

The application has been updated to copy the business size in the PO header section.

Archive Purchase Orders (POPARCH)

The application has been updated to archive the business size in the PO header section.

Expedite Purchase Orders (POMEXPD)

New **Business Size** and **NAICS Code** fields have been added in the PO line details section to allow you to select the size option to classify the vendor and the NAICS Code. These fields are disabled if the PO is a blanket PO.

Update Subcontract Retainage PO Status (POMSCST)

New **Business Size** and **NAICS Code** fields have been added on the PO header and PO line. These fields are read-only fields.

The same change applies to the Approve Pending Purchase Orders (POMSTAT) screen.

Print Purchase Orders (PORPPO)

When you select the **Print NAICS Code** checkbox and the PO header business size is **Small**, Costpoint prints the NAICS Code along with the associated SBA information. If the business size is not **Small**, then just the NAICS Code is printed.

The same behavior applies to the Print Purchase Order Change Orders (PORPCO) screen.

Print Purchase Order Activity Report (PORACTV)

When you select **NAICS Code on 1st Sort**, the report is printed in ascending order of the NAICS code. If you also selected **Print PO Line Detail** in addition to selecting **NAICS code on 1st Sort**, Costpoint groups PO lines by NAICS Code and prints each PO line detail in ascending order of the NAICS Code.

If PO line **Business Size** is not selected, the new PO header Business Size will be used. If the PO header **Business Size** is blank, the report uses the vendor business size.

View Item Purchasing Information (POQITEM)

A read-only **NAICS Code** field has been added on the screen to display the NAICS code for the item or miscellaneous charge on the PO line.

View Purchase Order Status (POQSTAT)

A read-only **NAICS Code** field has been added on the screen to display the NAICS code for the item.

View Purchase Order Change Orders (POQCHNG)

Read-only **NAICS Code** and **Business Size** fields have been added in the following locations:

- Main screen
- Current CO Line subtask
- Old CO Line subtask

- Compare COs subtask

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

You can now enter/select a NAICS code in the new **NAICS Code** fields on the Assign PO and Assign PO – Combined subtasks.

In addition, this change also updated the PO line business size defaulting logic to also default from the vendor NAICS Code if it is set as a small business. If the user did not enter a NAICS code or the NAICS code is not set to small business or is not linked to the vendor, the Business Size will default from the vendor classification.

Once you generate the POs, the **NAICS Code** and **Business Size** fields become non-editable.

The same changes apply to the Apply PO Info to Purchase Requisitions by Line (PPMRQLN).

Manage Purchase Order Header Information (PPMPOHDR)

You can now enter/select the business size to classify the vendor.

If you enter/select the NAICS Code, the business size defaults from the vendor NAICS Code if it is set as a small business. If the user did not enter a NAICS code or the NAICS code is not set to small business or is not linked to the vendor, the Business Size will default from the vendor classification.

Create Purchase Orders (PPPGPO)

Costpoint now populates the NAICS code and business size on the generated PO header and line.

Import Purchase Orders (AOPUTLPO)

You can now enter the PO header business size using the new input file field, **Business Size**. Valid values are Large, Small, Non-Profit, and Foreign/Other.

If you enter/select the NAICS Code, the business size defaults from the vendor NAICS Code if it is set as a small business. If the user did not enter a NAICS code or the NAICS code is not set to small business or is not linked to the vendor, the Business Size will default from the vendor classification.

Manage Vendor Returns (RCMRTRN)

You can now select the business size using the **Business Size** field on the Vendor Return Line to classify the vendor.

If you enter/select the NAICS Code, the business size defaults from the vendor NAICS Code if it is set as a small business. If the user did not enter a NAICS code or the NAICS code is not set to small business or is not linked to the vendor, the Business Size will default from the vendor classification.

Backflush Enhancement

This enhancement allows users to backflush lot and/or serial-controlled parts in first in, first out, or first expired order. In addition, users can select an option to allow backflush of requirements on relief that were used in the manufacturing order (MO) for assemblies that were rejected.

Configure Production Control Settings (PCMSET)

The screen has been modified so that the fields are now arranged under the following tabs:

- Defaults
- Planning
- Labor
- Routings
- MES

In addition, these new checkboxes have been added:

- **Allow Serial Lot Backflush**: Select this checkbox to enable you to backflush serial/lot parts.
- **Allow Rejections at MO Relief**: Select this checkbox to allow rejected quantities to be relieved upon MO relief.

Set Up Company (SYPCOMP)

The application copies the values for the new options on the Configure Production Control Settings screen from the original company when creating a new company by copying values from an existing company.

Manage Parts (PDMPART)

The application logic has been modified to allow you to use serial-lot tracked parts that are designated as a Backflush part if the **Allow Serial Lot Backflush** checkbox is selected on the Configure Production Control Settings screen.

The same change applies to the Manage Part Project Data (PDMPRJPD) screen.

Manage Manufacturing Orders (PCMMOMNT)

The application logic has been modified to allow you to use serial-lot tracked parts that are designated as a Backflush part if the **Allow Serial Lot Backflush** checkbox is selected on the Configure Production Control Settings screen. In addition, the screen now allows load from manufacturing bills of materials or loads that have been manually added to requirements.

A new **Rejected Quantity** field has been added to display rejected quantity from the MO header. The calculation of the value for this field is enabled if **the Allow Rejections at MO Relief** checkbox on the Configure Production Control Settings screen is selected; otherwise, the default value is zero and calculation of the field value is disabled.

Expedite Manufacturing Orders (PCMMEXPD)

A new **Rejected Quantity** field displays the rejected quantity from the MO header. The calculation of the value for this field is enabled if the **Allow Rejections at MO Relief** checkbox on the Configure Production Control Settings screen is selected; otherwise, the default value is zero and calculation of the field value is disabled.

Enter Manufacturing Order Issues (PCMMOIS)

If the new **Allow Serial Lot Backflush** checkbox in Configure Production Control Settings is selected and **Backflush Timing** is set to **First Issue** in Manage Parts, the backflush requirements are autoloaded. If the **Allow Serial Lot Backflush** checkbox is not selected, the backflush parts will not be autoloaded but will be issued.

The logic to auto-dispose backflush requirement serial/lot by FEFO/FIFO has been added as well.

Enter Manufacturing Order Reliefs (PCMRELMO)

If the new **Allow Serial Lot Backflush** checkbox in Configure Production Control Settings is selected and **Backflush Timing** is set to **Relief-Total** or **Relief-Partial** in Manage Parts, the system auto-disposes backflush requirement serial/lot by FEFO/FIFO.

If the new **Allow Rejections at MO Relief** setting is selected, then upon relief, rejected quantities are automatically transferred to the rejected location indicated on the MO relief. And if backflush is allowed, rejected quantities will be backflushed.

The following fields have also been added to the screen:

- **Rejected Quantity**: This field is editable when **Allow Rejections at MO Relief** checkbox is selected in the Configure Production Control Settings screen. Enter the quantity of the build part being rejected to inventory abbreviation or MO.
- **Rejected Location**: This field displays the location of the build part being rejected to inventory abbreviation or MO.
- **MO Reserved Qty**: This field displays the manufacturing order reserved quantity for the entered MO ID or requirement line.
- **Issue Qty**: This field displays the quantity to be issued to the MO.
- **MO Issue Qty**: This field displays the MO issue quantity.
- **SO Issue Qty**: This field displays the SO issue quantity.

View Manufacturing Order Status (PCQMOST)

If the **Allow Serial Lot Backflush** checkbox is selected on the Configure Production Control Settings screen, Costpoint allows serial-lot tracked parts that are designated as a backflush part and allows them to load from the Manufacturing Bill of Materials.

Add Recalculate Costs Functionality to Inventory Issue Screens

It is possible that Inventory costs could re-average while performing an issue transaction, and users were previously receiving errors during these transactions when this occurred. This update now automatically recalculates costs on Issues screens (Enter Issues to Project/Account/Org or PO, Manage Sales Order Inventory Issues, and Enter Manufacturing Order Issues) when costs no longer match. There will be no indication to the user that the cost changed.

Supplier Portal: Vendor Profile

This enhancement allows Supplier Portal Vendors to view their vendor profile, add new contacts and vendor employees, attach documents via CMI, and request additional changes through the notes via the new Manage Vendors (SPMVEND) application.

This enhancement is related to an Accounting feature.

Supplier Portal: Preview or Print Invoices from Manage Invoices

Supplier Portal users can now preview or print an invoice or a range of invoices from the Manage Invoices screen.

Hyperlinks to Other Transactions in Costpoint

Users can click a record ID hyperlink to open the record in several manage and inquiry applications within the Materials domain. This allows users to easily view additional details or make changes as necessary.

Application Name	Linked Fields	Redirects to
View Item Purchasing Information (POQITEM)	▪ Requisition ID (Requisition subtask) ▪ Quote ID (Quotes subtask) ▪ PO ID (Item Purchasing Information Inquiry CTW)	▪ View Purchase Requisition Status (PPQRQSTS) ▪ View Vendor Quotes (PPQVQT) ▪ View Purchase Order Status (POQSTAT)
Manage Purchase Requisitions (PPMNTRQ1)	▪ PO ID on the Assign PO Defaults tab	▪ View Purchase Order Status (POQSTAT)
Approve Purchase Requisitions (PPMRQAPX) Approve Purchase Requisition Lines (PPMRQAPL)	▪ Requisition ID ▪ Order Reference (Requisition line)	▪ Manage Purchase Requisitions (PPMNTRQ1) ▪ If the Order Reference type is S (Sales Order), Costpoint redirects to the View Sales Order Status Information (OEQSTAT) screen. If the Order Reference type is M (Manufacturing Order), Costpoint redirects to the View Manufacturing Order Status (PCQMOST) screen.
Assign Purchase Requisitions to Buyers (PPMBUYAS)	▪ Requisition ID (Header)	▪ Manage Purchase Requisitions (PPMNTRQ1)
Assign Purchase Requisition Lines to Buyers (PPMBUYAL)	▪ Requisition ID (Header)	▪ Manage Purchase Requisitions (PPMNTRQ1)
View Purchase Requisition Status (PPQRQSTS)	▪ RFQ ID (RFQ subtask)	▪ Manage Request for Quotes by Vendor (PPMRFQV)

Application Name	Linked Fields	Redirects to
Manage Purchase Orders (POMMAIN)	▪ Change Order ID	▪ View Purchase Order Change Orders (POQCHNG)
View Purchase Order Status (POQSTAT)	▪ Purchase Order ID (PO Status Inquiry) ▪ Requisition ID (Purchase Order Lines subtask » Requisition subtask) ▪ Item ID (Purchase Order Lines subtask)	▪ Manage Purchase Orders (POMMAIN) ▪ View Purchase Requisition Status (PPQRQSTS) ▪ View Item Purchasing Information (POQITEM)
View Part Inventory (INQPINV)	▪ MO ID ▪ SO ID ▪ PO ID ▪ Requisition ID ▪ (**Order** field, Requirements subtask)	▪ View Manufacturing Order Status (PCQMOST) ▪ View Sales Order Status Information (OEQSTAT) ▪ View Purchase Order Status (POQSTAT) ▪ View Manufacturing Order Status (PCQMOST)
Manage Shipping Transactions (OEMSHIP)	▪ SO ID	▪ View Sales Order Status Information (OEQSTAT)
Manage Invoices (OEMINVC1)	▪ SO ID	▪ View Sales Order Status Information (OEQSTAT)
Manage Invoices Supervisor Screen (OEMINVC2)	▪ SO ID	▪ View Sales Order Status Information (OEQSTAT)
Manage Manufacturing Orders (PCMMOMNT)	▪ PO ID (Requirements subtask » Open PO subtask) ▪ Requisition ID (Requirements subtask » Open Requisitions subtask) ▪ MO ID (Requirements » Open MOs subtask)	▪ View Purchase Order Status (POQSTAT) ▪ View Purchase Requisition Status (PPQRQSTS) ▪ View Manufacturing Order Status (PCQMOST)

Print from the Manage Screens

Users can preview or print documents/reports directly from the following Manage (Maintenance) screens so that they do not have to access another application when they want to preview/print a document/report that they are working on.

Screen	Reports to Print
Manage Purchase Orders (POMMAIN)	Purchase order or PO change order
Manage Purchase Requisitions (PPMNTRQ1)	Purchase Requisition
Manage Simple Purchase Requisitions (PPMQREQ)	Purchase Requisition
Manage Request for Quotes by Vendor (PPMRFQV)	Request for Quotes
Manage Purchase Order Receipts (RCMPORC)	Receipt Traveler
Manage Sales Orders (OEMNTSO1)	Sales Order Acknowledgment
Manage Invoices (OEMINVC1)	Sales Order Invoice
Manage Shipping Transactions (OEMSHIP)	Packing Slips
Manage Manufacturing Orders (PCMMOMNT)	Manufacturing Order Documents
Manage Physical Counts (INMPCLST)	Physical Count Sheet
Manage Inventory Reservations (INMPARSV)	Reservation Pick List
Manage PO/Req Inventory Reservations (INMPORSV)	Reservation Pick List
Apply PO Info to Purchase Requisitions (PPMNTRQ2)	Purchase Requisition
Apply PO Info to Purchase Requisitions by Line (PPMRQLN)	Purchase Requisition

If users have Full access or Update, Insert, and Delete rights on the Manage screen, they would be able to print the report. If an administrator does not want users to be able to print reports from the Manage applications, the administrator will need to deny access to the report on that specific screen via **Application Rights » Result Set Rights by Application » Report Rights** for the header record.

Print PO Updates

This feature adds the following functionalities to Print Purchase Orders and Print Purchase Order Change Orders:

- Print the Period of Performance for each PO line
- Exclude printing of PO lines with System Closed/Closed/Void status in the report
- Print the PO totals and Bill to Address before standard text
- Print a logo and return address on the purchase order and PO change order instead of having to choose one or the other
- Print the subcontractor ID on the purchase order

- Print the subcontractor number on the purchase order
- Include the Effective Date of the FAR/DFAR clause when chosen to be printed on the PO from the Subcontract Record

Configure Purchase Order Print Options (POMPOPTS)

The following are the changes to the screen:

- Rearranged the **Print on Purchase Order** group box
- Added an option to print the line period of performance (**Print Line Period of Performance** checkbox)
- Added an option to exclude printing of PO lines with System Closed/Closed/Void status in the report (**Exclude Void PO Lines**, **Exclude Closed PO Lines**, **Exclude System Closed PO Lines** checkboxes)
- Added an option to print the Project Subcontractor No.
  - When the **Project Subcontractor No.** checkbox is selected, Costpoint prints the Project Subcontractor Numbers with the field label Subcontractor No for each line on the purchase order and purchase order change order, if it exists for any of the PO line account record projects.
  - If the Project Subcontractor Number does not exist, the label is printed.
  - If the option is not selected, the Project Subcontractor Number and the label are not printed.
- Added an option to print the PO header subcontractor ID (**Print Subcontract ID** checkbox)
  - When the **Print Subcontract ID** checkbox is selected, Costpoint prints the PO header subcontract ID with the field label Subcontract ID in the header area of the PO and PO change order.
  - If the Subcontract ID does not exist, the label is not printed.
  - If the option is not selected, the Subcontract ID and the label are not printed.

Set Up Company (SYPCOMP)

The new fields in Configure Purchase Order Print Options are included in the setup.

Print Purchase Orders (PORPPO)

The following are the changes to the screen:

- Print the **PO Totals** and **Bill To** before the **Standard Text**
  - If the **Hdr Text Print Option** is set **to Bottom**, Costpoint prints the Standard Text after the **PO Totals** and **Bill to Address** on the PO and PO change order.
  - If **Hdr Notes Print Option** is set to **Bottom**, Costpoint prints the Header Notes after the PO Totals and Bill to Address but before the Hdr Text on the PO and PO change order.

> **Note:** If a logo is set up to be printed on the Purchase Order and PO Change Order and the user has selected the Return Address setting in Configure PO Print Option, Costpoint prints both the logo and the Return Address on the top-left corner.

- Added the **Print Subcontractor ID** checkbox to print the PO header Subcontractor ID
  - When the option is selected, Costpoint prints the PO Header Subcontract ID with the field label Subcontract ID in the Header area of the Purchase Order and Purchase Order Change Order, if it exists.
  - If the Subcontract ID does not exist, the label is not printed.
  - If the option is not selected, the Subcontract ID and the label are not printed.
- Added an option to print the Project Subcontractor No.
  - When the **Project Subcontractor No.** checkbox is selected on the Configure Purchase Order Print Options, Costpoint prints the Project Subcontractor No(s) with the field label Subcontractor No for each line on the purchase order and purchase order change order, if it exists for any of the PO line account record projects.
  - If the Project Subcontractor Number does not exist, the label is printed.
  - If the option is not selected, the Project Subcontractor Number and the label are not printed.
- Added an option to print the PO line period of performance where the default comes from the Configure Purchase Order Print Options screen (**Print Line Period of Performance** checkbox).
- Added an option to exclude printing of PO lines with System Closed/Closed/Void status in the report (**Exclude Void PO Lines**, **Exclude Closed PO Lines**, **Exclude System Closed PO Lines** checkboxes) where the default comes from Configure Purchase Order Print Options
- Added an option to print the effective date of the clause when the **FAR Clause Message for Priority Projects** checkbox is selected in Configure Purchase Order Print Options.

Print Purchase Order Change Orders (PORPCO)

The following are the changes to the screen:

- Allow to print the PO Totals and Bill To before the Standard Text
  - If the **Hdr Text Print Option** is set to **Bottom**, Costpoint prints the **Standard Text** after the PO Totals and Bill to address on the PO and PO change order.
  - If **Hdr Notes Print Option** is set to **Bottom**, Costpoint prints the Header Notes after the PO Totals and Bill to Address but before the Hdr Text on the PO and PO change order.

Note: If a logo is set up to be printed on the Purchase Order and PO Change Order, and the user has selected the Return Address setting in Configure PO Print Option, Costpoint prints both the logo and the Return Address on the top left corner.

- Added an option to print the PO header Subcontractor ID
  - When the option is selected, Costpoint prints the PO Header Subcontract ID with the field label Subcontract ID in the Header area of the Purchase Order and Purchase Order Change Order, if it exists.
  - If the Subcontract ID does not exist, the label is not printed.
  - If the option is not selected, the Subcontract ID nor the label is printed.
- Added an option to print the Project Subcontractor No.
  - When the Project Subcontractor No. checkbox is selected, Costpoint prints the Project Subcontractor No(s) with the field label Subcontractor No for each line on the purchase order and purchase order change order, if it exists for any of the PO line account record projects.

    - If the Project Subcontractor Number does not exist, the label is printed.
    - If the option is not selected, the Project Subcontractor Number nor the label is not printed.
- Added an option to print PO line period of performance where default will be coming from the Configure Purchase Order Print Options (Print Line Period of Performance checkbox).
- Added an option to exclude printing of PO lines with System Closed/Closed/Void status in the report (Exclude Void PO Lines, Exclude Closed PO Lines, Exclude System Closed PO Lines checkboxes) where default comes from Configure Purchase Order Print Options
- When FAR Clause Message for Priority Projects checkbox is selected in Configure Purchase Order Print Options, Costpoint also prints the Effective date of the clause.

View Part Inventory Defaults

This update adds options to the Configure Inventory Settings screen that allow users to set defaults for the filter criteria on the View Part Inventory screen, including Suppress Zero Quantity Rows, Include Inventory from Other Companies, and Part/Project Selection Criteria.

Configure Inventory Settings (INMSET)

The application now has the following tabs to separate the fields into logical groups:

- Cost Options
- Project Options
- Allocations
- Adj/Count Options
- Others

View Part Inventory (INQPINV)

The values entered in Configure Inventory Settings determine the defaults in this application.

PO Import Updates: POP, CLIN, Acct Dist

This update allows users to set the value of the following fields when importing purchase orders:

- PO Header
    - Freeze Rate checkbox (Exchange Rates subtask)
    - Requisition ID
    - Due Date
    - Desired Date
    - Period of Performance Start Date
    - Period of Performance End Date
- PO Line
    - Period of Performance Start Date
    - Period of Performance End Date
    - CLIN

- Commodity Code
- Ship via (currently defaults from Vendor)

Users can also import multiple PO Line Account records per line.

PO Reconcile Performance Tuning

This update improves the overall performance of the system when reconciling a PO on the Reconcile Purchase Order (POPRECON) screen.

Simplify Reject to Accept Process

Manage Quality Control Inspections (RCMINSP)

This update simplifies the Accept process of quantities when material has already been rejected in Manage Quality Inspections.

Vouchered PO Receipt Settings: Hard Stop Settings and Communications

Users can opt to show a warning or error when purchase order (PO) receipts or inspections are edited and a voucher exists for the PO receipt or inspection record. In addition, if Costpoint displays a warning, users can set up automatic emails to contact the Accounts Payable department when users edit or delete a PO receipt that has been vouchered. Emails are sent for each receipt/PO modification upon save. For example:

- If the user modifies the lines on the receipt, an email will be sent.
- If the user modifies multiple records, then upon save, all records will be updated and a single email is sent with the update/deleted information for each receipt/PO.

The following are the applications affected by the update.

Configure Purchase Order Voucher Settings (POMAPSET)

Additional options now allow you to configure the validation of receipts/inspections that have vouchers created for them. You can configure the validation by using the following group boxes on the Receipt Handling tab:

- **Voucher**: Use the drop-down options to apply either a warning or a hard error validation for modification to a vouchered receipt and inspection lines for 3-way individual or total.
- **Posted Voucher**: Use the drop-down options to apply either a warning or hard error validation for modification to a posted voucher receipt and inspection lines for 3-way individual or total.
- **Notification for Validations**: When one of the above settings is set to **Warning**, use this group box to send email notifications to the AP department about modifications made to the Vouchered Receipt or Inspection. You can enter multiple email addresses by separating them with a semicolon (;).

Manage Purchase Order Receipts (RCMPORC)

Validations have been added to support the changes to the validation of receipts/inspections for vouchered purchase orders (POs).

The same validations have been added to the Manage Quality Control Inspections (RCMINSP) screen. If email notifications are set up for warnings, Costpoint automatically sends an email to the email address entered in the settings when a change is made to a receipt line that has been vouchered.

Buyer Limit Validation on PO Line

This update allows users to insert new purchase orders lines as pending on an existing purchase order (PO) with receipts/vouchers where the approver can approve or reject the new PO line.

In addition, users will now be able to make changes to non-monetary fields on the PO without the need to revalidate against the Buyer Limits and change the PO line back to **Pending**. Also, changes to monetary fields will be revalidated only if the values are above what was originally approved.

Configure Purchasing Settings (POMSET)

A new **Allow pending lines if Over Buyer's Limit and Receipt/Voucher Exist** checkbox has been added to the screen. Select this checkbox to allow adding new PO lines even if it exceeds the buyer limit without requiring the users to update the buyer limit. New PO lines will automatically have a Pending status and will require approval.

Set Up Company (SYPCOMP)

You can now use the new checkboxes added on the Configure Purchasing Settings and View Purchase Order Status screens when you set up a new company.

View Purchase Order Status (POQSTAT)

A new **Show POs with Pending Lines Only** has been added to the screen. Select this checkbox to display the list of purchase orders with at least one PO line that has a Pending status.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

You can now assign a requisition line to an existing PO with receipts/vouchers even if it will make the buyer go over their limit if the **Allow pending lines if Over Buyer's Limit and Receipt/Voucher Exist** and **Allow pending lines to Open, Closed or System Closed Pos** checkboxes are selected.

The same enhancement applies to the Apply PO Info to Purchase Requisitions by Line (PPMRQLN) screen.

Create Purchase Orders (PPPGPO)

You can now add a requisition line as a pending PO line on an existing PO with receipts/vouchers where the approver can approve or reject at the PO line level if the **Allow pending lines if Over Buyer's Limit and Receipt/Voucher Exist** and **Allow pending lines to Open, Closed or System Closed Pos** checkboxes are selected.

Manage Purchase Orders (POMMAIN)

The application will no longer revalidate the buyer’s limit if the quantity or amounts are not changed and/or when the PO line amount or the total amount is less than or equal to the approved value. In addition, you will no longer encounter an error if the PO/PO line is over the buyer limit when the **Allow pending lines if Over Buyer's Limit and Receipt/Voucher Exist** checkbox is selected. An additional PO line amount that makes the total amount exceed the authorized buyer limit will still be saved but will be set to Pending.

Import Purchase Orders (AOPUTLPO)

The application will no longer revalidate the buyer limit if the quantity or amount is not changed. You will also be allowed to add a PO/PO line amount that exceeds the authorized buyer limit when the **Allow pending lines if Over Buyer's Limit and Receipt/Voucher Exist** checkbox is selected. The additional PO/PO line is set to Pending.

Plan, Make, and Buy Pre-Released Parts

This update provides new settings that allow users to use MRP to plan unreleased parts and also lets users firm those planned orders. An additional setting has been added to allow users to purchase unreleased parts by creating requisitions and purchase orders. They will be able to receive the unreleased parts but will not be able to accept them until they are released.

Configure Bills of Material Settings (BMMSET)

The application has been updated to allow selections for unreleased Make and/or Buy components into planned orders by MRP. To support this change, a new **Allow Prereleased components to be Released** checkbox has been added to allow components entered on a manufacturing bills of material (MBOM) with a status of pre-release to be checked as Component Released.

Configure Purchase Requisition Settings (PPMRQSET)

You can use the **Allow Procurement of Pre-released Buy Parts** checkbox so that you can procure parts that are in the status of pre-release.

Manage Manufacturing Bills of Material (BMMMBOM1)

When the **Allow Prereleased components to be Released** checkbox is selected in Configure Bills of Material Settings, you can manually select the **Component Released** checkbox. The MBOM status cannot be changed to Released if any component part release status is pre-release. The same change applies to the Release Manufacturing Bills of Material (BMMMBOM2).

Manage Purchase Requisitions (PPMNTRQ1)

You can now enter parts with pre-release status on the requisition/PO when the **Allow Procurement of Pre-released Buy Parts** checkbox is selected on the Configure Purchase Requisition Settings screen. When you enter a part/item that is in pre-release status, the application displays a warning message that the part/item will not be accepted to the inventory until the part/item is released. The same changes apply to the following screens:

- Manage Simple Purchase Requisitions (PPMQREQ)
- Apply PO Info to Purchase Requisitions (PPMNTRQ2)
- Apply PO Info to Purchase Requisitions by Line (PPMRQLN)
- Manage Purchase Orders (POMMAIN)

Create Purchase Orders (PPPGPO)

You can now enter parts with pre-release status on the requisition/PO when the **Allow Procurement of Pre-released Buy Parts** checkbox is selected on the Configure Purchase Requisition Settings screen.

Manage Purchase Order Receipts (RCMPORC)

You can receive/reject pre-released parts and not accept them until the part status is set to Released. To support this change, the application displays a warning message and an error message to remind you that the part has a status of pre-release and that it must be released first before the part can be added into inventory. Rejected pre-released parts can only be returned to the vendor for replace/repair or credit.

Manage Quality Control Inspections (RCMINSP)

The following are the changes to this application:

- Pre-released parts cannot be accepted until they are released.
- Pre-released parts can be put into Materials Review Board (MRB) until the part is released. Once it is released, the MRB can be changed to accepted or rejected.
- Pre-released parts can also be rejected but only for Return to Vendor (RTV) status for replace/repair or credit.

To support this change, the application displays a warning message and an error message to remind the user that the part has a status of pre-release and that it must be released first before the part can be added into inventory.

Manage MRP Action Messages (MRMACTM)

A display-only **Part Status** field (**Pre-Release, Released, Phase-Out, Estimating,** and **Obsolete** status options) has been added to the screen to allow parts with a status of pre-release to be loaded on requisitions/purchase orders. The same changes apply to the Manage Detailed Part Schedule (MRMDTPT) screen.

Firm Material Requirements Planning Planned Orders (MRPFPO)

If the **Allow Pre-Released Components to be Released** is selected on the Configure Bills of Material Settings screen, it enables the **Comp Released** checkbox on the Manage Manufacturing Bills of Material screen and allows the user to select it even if the Part Status is **Pre-Release**. Also, MRP plans for components with a Part Status of **Pre-Release** when the MBOM **Comp Released** checkbox is selected.

In addition, the application now allows parts with a status of **Pre-Release** to be firmed into a requisition when **Allow Procurement of Pre-Released Buy Parts** is selected or into MOs when the existing setting for **Allow MO for Unreleased Build Parts** in Configure Production Control Settings is selected.

Update Materials Requirement Plan (MRPMRP)

If the **Allow Pre-Released Components to be Released** is selected, it enables the **Comp Released** checkbox and allows the user to select it even if the Part Status is **Pre-Release**. MRP plans for components with a Part Status of **Pre-Release** when the MBOM **Comp Released** checkbox is selected.

Configure Production Control Settings (PCMSET)

The existing setting for **Allow MO for Unreleased Build Parts** has been changed to now allow the Firm MRP process to create MOs for pre-released parts if the MBOM **Comp Release** checkbox is selected.

Option to Force PO Change Order

This feature adds a new setting that disables certain fields on the purchase order if a change order has not been created. The user may choose the fields they want to disable with this setting. Pending purchase orders can still be edited without a change order.

Configure Purchasing Settings (POMSET)

The application main screen has been arranged to have two tabs:

- PO Status: Use this tab to view and enter the purchase order (PO) status details.
- Change Order Controls: Use this tab to view and enter the change order controls for the PO.

In addition, these new checkboxes and group box have been added:

- **Require Change Order for Modifications**: Select this checkbox to disallow edits to the PO once it is released (Open). Select this checkbox to force a change order to modify a PO with a status of **Open**.
- **Allow Changes in Expedite Purchase Orders**: Select this checkbox to allow changes in a PO to be expedited without a change order.
- **Allow New Line without Change Order**: Select this checkbox to allow new lines to be added to the existing POs without a change order.
- **Change Order Fields Group Box**: Select the purchase order line fields that you would like to disable when the PO is not pending and a change order does not exist.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

An application validation has been added to allow the processing of a requisition and the addition of a line to an existing purchase order. The same change applies to the Apply PO Info to Purchase Requisitions by Line (PPMRQLN).

Manage Purchase Orders (POMMAIN)

A new **Change Allowed** checkbox has been added to the screen. This checkbox is visible if the **Require Change Order for Modifications** checkbox is selected on the Configure Purchasing Settings screen. This checkbox will be cleared if a change order is required to make edits to the purchase order. If edits are allowed, the checkbox is selected and disabled.

Approve Pending Purchase Orders (POMSTAT)

The application has been updated so that if a PO has been approved, the **Change Allowed** checkbox in Manage Purchase Orders is cleared and disabled; Changes to approved PO will then need a change order. For PO lines with **Pending** status, you can still make changes to the details whether the **Change Allowed** checkbox is selected or not.

Create Purchase Order Change Orders (POMCHNG)

The application has been updated so that if a change order is required, the approval sets the PO header **Change Allowed** checkbox on the Manage Purchase Orders screen to selected to allow edits to the PO. Once you made the changes in Manage Purchase Orders and saved the PO changes, the PO header **Change Allowed** checkbox will be cleared and disabled.

Create Blanket Purchase Order Releases (POMRELS)

The application has been updated so that if a change order is required, the create blanket purchase order release process sets the PO header **Change Allowed** to not selected to disallow edits. Only releases with a **Pending** status are allowed for editing.

Expedite Purchase Orders (POMEXPD)

The application has been updated so that if you select the **Allow Changes in Expedite Purchase Orders** checkbox on the Configure Purchasing Settings screen, you can modify the **Status**, **Due Date**, and **Desired Date** fields.

Create Purchase Orders (PPPGPO)

Validation has been added to the application when processing a requisition to add a line to an existing PO.

The same change applies to the Apply PO Info to Purchase Requisitions (PPMNTRQ2) and Apply PO Info to Purchase Requisitions by Line (PPMRQLN) screens.

Import Purchase Orders (AOPUTLPO)

For POs with **Open** status and **Change Allowed** checkbox is not selected, the application now validates changes to the PO. To update the PO, change the **Create Change Order** to **Y** update the **Change Order Number**.

Intracompany Work Assignment (IWA) Changes in Procurement

This feature allows you to set up intracompany subcontractor agreements, allowing intracompany vendor employees to charge the work assignment on their timesheet/expense in their company and view/update that work assignment in the requesting company's Supplier Portal. This will also update the employee's home company information based on the data in the work assignment, which eliminates the need for double entry of timesheet or expense information.

This enhancement is related to Projects and Accounting features.

The following are the details of application changes.

Intracompany Work Assignments (SPMSIWA)

This new application (**Materials » Supplier Portal » Intracompany Work Assignments**) allows performing companies or intracompany vendors to view, modify, and manage information on the work assignment created by the contracting company. Not all fields on this screen are enabled for editing. To some extent, you can specify the intracompany posting information, add employees who will be included in the work force assigned to the work assignment, as well as enter the project, account, organization, and other charging information that they will use when entering their time and expense for a specific charge line.

The Intracompany Work Assignments (SPMSIWA) screen that will be visible to vendors is set up with a Supplier Portal User Group and/or Module Rights to Supplier Portal. This screen is designed to be used for Intracompany Work Assignments only. To remove user access to this screen, edit the Supplier Portal User Group to deny Application Rights to the screen.

Apply PO Info to Requisitions (PPMNTRQ2)

When an Intracompany Vendor is assigned, the purchase order type must be one of the following:

- A: Subcontractor Agreement
- K: Subcontractor Agreement Blanket
- L: Subcontractor Agreement Release

The PO line should be limited to Services and Miscellaneous, with two-way match type.

On the Assign PO Defaults tab, an **Intracompany Vendor** checkbox has been added. This checkbox is selected if the vendor is an Intracompany-type vendor.

On the Assign PO subtask, the new **Intracompany Vendor** checkbox is selected if the vendor is an Intracompany vendor.

Apply PO Info to Requisitions by Line (PPMRQLN)

When an Intracompany Vendor is assigned, the purchase order type must be one of the following:

- A: Subcontractor Agreement
- K: Subcontractor Agreement Blanket
- L: Subcontractor Agreement Release

The PO line should be limited to Services and Miscellaneous, with two-way match type.

On the Header, an **Intracompany Vendor** checkbox has been added. This checkbox is selected if the vendor is an Intracompany-type vendor.

On the Assign PO subtask, the new **Intracompany Vendor** checkbox is selected if the vendor is an Intracompany vendor.

Manage Purchase Orders (POMMAIN)

When an Intracompany Vendor is assigned, the purchase order type must be one of the following:

- A: Subcontractor Agreement
- K: Subcontractor Agreement Blanket
- L: Subcontractor Agreement Release

PO line should be limited to Services and Miscellaneous, with 2-way match type.

On the Header tab, a checkbox, **Intracompany Vendor**, is added. This checkbox is selected if the vendor is an Intracompany-type vendor.

View Purchase Order Status (POQSTAT)

Intracompany Vendor has been added as a vendor type as selected from the Manage Vendors screen.

Manage Purchase Order Vouchers (POMPOVCH)

The application now allows you to delete journal entries that are created but not posted.

Import Purchase Orders (AOPUTLPO)

When an Intracompany Vendor is assigned, the purchase order type must be one of the following:

- A: Subcontractor Agreement
- K: Subcontractor Agreement Blanket
- L: Subcontractor Agreement Release

Manage Buyer Actions (POMBACT)

You can now view work assignment details on the new Work Assignment subtask. This subtask is display-only. The same change applies to the Manage Supplier Actions (SPMSPACT) screen.

Manage Invoices (SPMINVC)

When an IWA invoice is approved, the process automatically creates a journal entry for the subcontract company.

Manage Purchase Order Receipts (RCMPORC)

The application has been updated to exclude Intracompany Work Assignment POs if the vendor is classified as an Intracompany vendor. The same change applies to the following screens:

- Manage Shipping Information (SPMSHIP)
- Manage Vendor Returns (RCMRTRN)
- Import Purchase Order Receipts (AOPRCPRE)
- Manage PO/Req Inventory Reservations (INMPORSV)
- Enter Issues to Project/Account/Org or PO (INMPAISS)

Mfg Order Quantity Yield Greater Than 100%

This update allows users to have a quantity yield that is greater than 100% for situations where the item goes through a process that causes it to start at a certain size and grow more than 100% of the original size.

This change affects the following applications:

- Manage Parts (PDMPART)
- Import Items (AOPITEM)
- Manage Provisional Parts (PDMPRPT)
- Manage Proposal Bills of Material (MEMPBOM)
- Manage Manufacturing Bills of Material (BMMMBOM1)
- Release Manufacturing Bills of Material (BMMMBOM2)
- Manage Engineering Bills of Material (BMMEBOM1)
- Release Engineering Bills of Material (BMMEBOM2)

Inventory Balance

This update allows the user to see an inventory balance after each transaction in View Inventory Transaction History. Also, a new Print Stock Status Summary Report (INRSUMM) has been added to the Inventory Closing Module.

Print Stock Status Summary Report (INRSUMM)

This new application (**Materials » Inventory » Inventory Closing » Print Stock Status Summary Report**) displays summary cost balances for inventory based on the criteria selected based on project, inventory abbreviation, and warehouse. You can run this application as part of a batch process.

View Inventory Transaction History (INQHSTPR)

New **On Hand Balance** fields in the **From** and **To** group boxes display the on-hand balance after a transaction is performed.

Print Inventory Transaction History (INRHSTPA)

You can now view the Balance From and To in the generated report.

Enter Issues to Project/Account/Org or PO (INMPAISS)

When you execute a transaction and click **Save**, Costpoint updates the INVT_TRN_LN. INVT_BAL_FR table with a snapshot of INVT.ON_HAND_QTY (at the end of the transaction) inventory balance.

Enter Inventory Transfers (INMPAXFR)

When you execute a transaction and click **Save**, Costpoint updates the INVT_TRN_LN. INVT_BAL_FR table with a snapshot of INVT.ON_HAND_QTY (at the end of the transaction) inventory balance (from INVT_ABBRV) and a snapshot of INVT.ON_HAND_QTY (at the end of the transaction) inventory balance (to INVT_ABBRV).

The same change applies to the Create Mass Inventory Transfers (INPMSXFR) screen.

Enter Location Transfers (INMLOXFR)

When you execute a transaction and click **Save**, Costpoint updates the INVT_TRN_LN. INVT_BAL_FR table with a snapshot of INVT.ON_HAND_QTY (at the end of the transaction) inventory balance (from INVT_ABBRV).

The same change applies to the following screens:

- Enter Quantity Adjustments (INMQTADJ)
- Enter Scrap Adjustments (INMSCADJ)
- Manage Sales Order Inventory Issues (OEMISSU1)
- Enter Manufacturing Order Issues (PCMMOISS)
- Enter Manufacturing Order Reliefs (PCMRELMO)
- Manage Quality Control Inspections (RCMINSP)
- Enter Miscellaneous Inventory Receipts (RCMMSRC)
- Manage Purchase Order Receipts (RCMPORC)

- Manage Vendor Returns (RCMRTRN)
- Manage Purchase Order Receipts (RCMPORC)

Import Inventory Transactions (AOPINTRN)

When you transact and click **Save**, the screen imports the following transaction types:

- I: Issue to Project/Account/Organization
- W: Issue to Manufacturing Order
- H: Actual Counts

Single- to Multi-User Reports in Materials

This enhancement allows users to run reports simultaneously while Costpoint processes the reports as a sequence of jobs. The following applications will have reporting changes:

- Print Manufacturing Order Cost Report (PCRMOCST)
- Create MO WIP Variance Journal Entry (PCPWIPV)

For the Create MO WIP Variance Journal Entry screen, **Create MO WIP Variance JE** has been removed from the Action Menu.

For related features in other domains, see the following sections:

- Multi-User Report Printing in Accounting
- Multi-User Reports in Projects

Ignore Negative MO Cost Amount

The following are the changes related to this enhancement.

Configure Production Control Settings (PCMSET)

A new **Exclude Recast Overtime TS lines from Neg Cost validation** checkbox has been added to exclude overtime timesheet lines from the validation for the setting **Allowable Negative MO Cost Amount**, which applies to any/all cost elements. This also allows you to re-class labor to different accounts, but costs will remain with the manufacturing order (MO).

Set Up Company (SYPCOMP)

The application has been updated to copy the value of the new checkbox in PCMSET from the original company to the new company.

Approval Workflow Adaptive Cards

For the requisition approval workflow, you can now view the information related to the purchase requisition and approve the purchase requisition via email. To enable this functionality, select the **Enable Workflow Interactive Email** and **Enable Requisition Approval Interactive Email** checkboxes on the Configure System Settings screen.

The information that displays in the purchase requisition email is based on the case labels you selected on the Manage Workflow Case Labels screen.

This enhancement is related to the Interactive Emails feature.

People/Regulatory

This section describes version 8.2 enhancements for Costpoint People and Regulatory.

Allow Employees to Update Veteran Status and Preferred Name Information

Employees can now change their veteran status, discharge date, and preferred name in Costpoint Employee Self Service. This allows employees to have more control over their employee data. You can also set up Employee Self Service to send notifications to HR administrators when employees make changes to their information.

Employee Personal Info (ESQEMPLPERINFO)

The Employee Personal Info screen provides employees the ability to update their veteran identification status and preferred name. The following options and fields are now enabled for employees:

- Disabled Veteran
- Active Duty Warfare or Campaign Badge Veteran
- Armed Forces Service Medal Veteran
- Recently Separated Veteran
- Discharge/Release Date
- Protected Veteran (Declined to Self-Identify)
- Not a Protected Veteran
- Declined to provide veteran status
- Preferred Name

Configure Self Service Settings (ESMESS)

A new Email Notifications subtask allows you to set up email notifications when employees make changes to their veteran identification status, discharge date, and preferred name on the Employee Personal Info screen.

Import All Relevant Employee Fields and Generate User IDs on the Import Employee Data Screen

The Import Employee Data screen provides HR managers with the ability to import relevant employee fields that were not included in the import process previously. HR managers no longer have to edit the imported records manually in Costpoint to add the missing information. The following fields have been added to the import process:

Field	Costpoint Table/Column
Last Day Worked	EMPL.LAST_DAY_DT
Not a protected veteran	EMPL.vet_status_np_fl

Field	Costpoint Table/Column
Declined to provide veteran status	EMPL.vet_status_declined
Recently separated veteran	EMPL.vet_status_rs
Supervisor ID for EMPL_LAB_INFO	EMPL_LAB_INFO.spvsr_empl_id
Requisition Number	EMPL_LAB_INFO.req_no
Contractor flag	EMPL.contractor_fl
Blind flag	EMPL.blind_fl
GovWin IQ ID	EMPL.govwiniq_login_id
ESS User	N/A - not stored
Login ID	N/A - not stored EMPL• Allow entry of up to 254 alphanumeric characters and special characters
User ID	N/A - not stored EMPL

If the **Auto-create User Accounts** checkbox is selected on the Configure System Settings screen, the Import Employees application will generate Costpoint user IDs for new employees as part of the Import Employee Data process. HR managers no longer have to add the user IDs manually for imported new employee records.

The Manage Employee Import User-Defined Format screen now allows you to select the additional fields and add them to the file layout for Record 5.

Allow Multiple Users to Create Retroactive Timesheet Adjustments

Costpoint allows multiple users to access the Create Retroactive Timesheet Adjustments screen and run the process at the same time.

Allow Multiple Users to Access Post Timesheets

Costpoint allows multiple users to access the Post Timesheets screen and run the process at the same time.

Allow Managers to Add or Change Salary and Job Title Data

Managers can now submit change requests for the information of their direct and indirect reports on the Team Details screen. Change requests can be subject to approval from HR managers. This feature includes approval workflows for employee salary and job title.

Configure Team Management Settings (HTMSETTINGS)

Human resources (HR) managers can now select the **Team Details** application from the Change Options table. Costpoint users who have access to this application can set up Team Management to:

- Require HR approval if there are changes on the Team Details screen.
  - Send email notifications when there are changes/approvals to the data on the Team Details screen.

Team Details (HTMDETAIL)

Managers that need to make required changes for their employees can now add or change a salary record on the Salary History subtask of the Team Details screen. To use this feature, managers must be set up on the Manage Users screen to have full access to the Team Details screen and its Salary History subtask.

Manage Change Requests (HTMCHANGES)

HR Managers can now approve or reject or pending change requests for the Team Details application.

Activate Pending Change Requests (HTPCHANGES)

HR Managers can now process any approved or pending change requests for the Team Details application in order to update the employee salary information records with the changed data. To support this new functionality, a **Team Details** checkbox was added in the **Applications** group box of the Activate Pending Change Requests screen.

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report was updated to reflect the databases' changes for this feature.

Direct Charge Employer Contributions and Union Fringes

Prior to this release, Costpoint used only the **Direct Charge Union Fringe/Employer Contribution** checkbox on the Configure Payroll Settings screen to control direct charging for both non-union contributions and union fringes. This release separates controls so that you can opt to direct charge contributions separately from direct charging union fringes. The option to direct charge union fringes was moved to the Configure Labor Settings screen. The option to direct charge non-union contributions is available on the Configure Payroll Settings screen.

This release also provides the following features:

- Ability to specify how timesheet lines will be selected for union fringe processing
- Ability to charge a project other than the timesheet line project
- Updated union fringe calculations and logic
- Track additional union fringe detail in payroll processing
- Track the **Union Employee** flag value in the Payroll module
- Transfer of Fringe Detail to the Contributions subtasks of the Manage Employee Earnings History and Manage Payroll Records screens

- Contribution amount for union fringes can no longer be changed. If Fringe Detail Amount was updated, the Contributions Amount will be automatically updated to be the sum of all child fringe detail records.
- Audit tracking of changes to the Fringe Detail subtask (EMP_PR_FRNG_DETL)
- Track the union non-cash fringe accrual organization through payroll processing

Configure Payroll Settings (PRMPRSET)

- The **Direct Charge Union Fringe/Employer Contribution** checkbox was removed and replaced with the **Direct charge employer contributions** checkbox. This new checkbox allows you to direct charge employer contributions when payroll is posted.
- The Direct Charge Options subtask is now the Direct Charge Options tab.
- The Reference Number Settings subtask is now the Reference Numbers tab.
- The **Advance Earned Income Credit** field was removed.
- The **Allow Changes to Edit Payroll Screen** checkbox is now the **Allow edits in Manage Payroll Records** checkbox.
- The **Edit Payroll** checkbox in the **Enable Audit File Tracking** group box is now the **Payroll Records** checkbox.
- The **Employee Earnings** checkbox in the **Enable Audit File Tracking** group box is now the **Employee Earnings History** checkbox.
- The **Post Fringe Expense at Balance Sheet Level** checkbox is now the **Post employer payroll expenses at balance sheet level** checkbox.
- On the Direct Charge Options tab, the **Direct Charge Employer Fringes** checkbox is now the **Direct charge employer tax expenses** checkbox.
- The layout of the screen and tabs have been updated.

Configure Labor Settings (LDMLABOR)

- A new **Direct charge union fringes** checkbox allows you directly charge all union cash, non-cash, and stamp fringes to a project.
- The following existing fields/checkboxes moved from the Timesheet Options tab to a new Labor Options tab:
  - **Enable timesheet batch processing** checkbox
  - **Enable wage determination functionality** checkbox. Previously, this was the **Enable Batch** checkbox.
  - **Enable union functionality** checkbox.
  - **Apply union non-cash fringe ceilings by local** checkbox.
  - **Direct charge union fringes** checkbox. Previously, this was the **Union Fringe Ceilings by Local** checkbox.
  - **Timesheet Posting** group box
  - **Accrued Salaries Account** field
  - **Post leave memo timesheet lines to the general ledger** checkbox
  - **Shop Floor Time** group box

  - **Correcting Timesheet Date Source** drop-down list. Previously, this was the **Correcting Timesheet Date Method** checkbox.
  - **Export unposted used leave** checkbox
- The fields on the Timesheet Options tab were rearranged and labels were updated.
  - The **Prorate Calculation Method** label was removed.
  - The **Days per Cycle** checkbox is now the **Prorate based on work days per cycle** checkbox.
  - The **Default Effective Bill Date** drop-down list is now the **Effective Bill Date Source** drop-down list.
  - The **Labor Only Timesheets** group box is now the **Validation of Labor-Only Timesheets** group box.
  - The **Use Standard Rates** checkbox is now the **Use standard rates to calculate labor cost** checkbox.

Set Up Company (SYPCOMP)

When you generate a new Configure Payroll Settings (PR_SETTINGS) record, the application will populate the new DC_ER_CNTRB_FL column based on the company being copied.

When you generate a new Configure Labor Settings (LAB_SETTINGS) record, the application will populate the new DC_ER_CNTRB_FL based on the company being copied.

Manage Pay Periods (PRMPRPD)

The **Union/Local** field for the pay cycle was removed.

Manage Deductions (PRMDED)

- The application was updated to accommodate non-project timesheet lines when posting direct-charge contributions.
- New **Contribution Direct Expense** fields were added in the Posting/Vendor Information subtask. The following fields will allow you to select expense accounts and reference numbers that the Post Payroll Journal process will use when posting the employer contribution expense to projects:
  - Contribution Direct Expense Posting Account
  - Contribution Direct Expense Reference 1
  - Contribution Direct Expense Reference 2
- The application will use the new **Direct charge employer contributions** checkbox on the Configure Payroll Settings screen to determine whether non-union contributions should be direct-charged.
- On the Posting/Vendor Information subtask, group boxes were removed and labels of existing fields were updated.
  - The **Withholding Account** field is now the **Deduction Withholding Posting Account** field.
  - The **Reference Number 1** field is now the **Deduction Withholding Reference 1** field.
  - The **Reference Number 2** is now the **Deduction Withholding Reference 2** field.
  - The **Accrual Account** field is now the **Contribution Accrual Posting Account** field.

- The **Reference Number 1** field is now the **Contribution Accrual Reference 1** field.
- The **Reference Number 2** field is now the **Contribution Accrual Reference 2** field.
- The **Expense Account** field is now the **Contribution Expense Posting Account** field.
- The **Reference Number 1** field is now the **Contribution Expense Reference 1** field.
- The **Reference Number 2** field is now the **Contribution Expense Reference 2** field.

Manage Union Profiles (LDMUNPRO)

- The application direct charging logic was updated.
- The **Charge Project** checkbox is now the **Direct Charge** checkbox. The application automatically selects and disables the **Direct Charge** checkbox if the login company's new **Direct charge union fringes** checkbox is selected on the Configure Labor Settings screen.
- A new **Timesheet Line Selection Method** drop-down list allows you to specify how timesheet lines will be selected for union fringe processing.
- You can now charge a project other than the timesheet line project. A **Project Source** drop-down list allows you to specify whether the union fringe should be charged to the timesheet line project or a user-specified project. If you select a **Project Source** of **Charge Project**, you can specify the project to which the fringe will be charged in a new **Charge Project** field.
- The **Fringe Calculation Method** field is now the **Calculation Method** field.
- The **Fringe Org** field is now the **Organization Source** field.
- The **Pay Type** field is now the **Fringe Pay Type** field.

Manage Timesheets (LDMTIME)

- Union Cash Fringe Calculations and logic were updated.
- If the login company's **Post employer payroll expenses at balance sheet level** checkbox is selected in the Configure Payroll Settings screen, the application uses the balance sheet level of the organization on the union cash fringe timesheet line.
- The calculation of the hourly rate (HRLY_AMT) on the Timesheet Line (TS_LN) table was updated. Previously, the column was populated with the employee's salary rate. The actual hourly rate used is now used in the fringe calculation.

> **Note:** The updates on the Manage Timesheets screen are also applicable to the Manage Correcting Timesheets (LDMCTIME) screen.

Apply Timesheet Adjustments in Batch Mode (LDPAUTO)

- Union fringe calculations and logic were updated.
- Fringe Code was added to the Generate Fringe Report.

> **Note:** The updates on the Apply Timesheet Adjustments in Batch Mode screen are also applicable to the following screens:
>
> - Import Timesheets (AOPUTLTS)
> - Import Timesheets from Deltek Time and Expense (LDPUPET)

Compute Payroll (PRPCPR)

- The following were updated:
  - Union fringe calculations and logic
  - Contribution and employer tax expense direct-charging logic
  - Union fringe direct charge logic
- The application now:
  - Tracks the Union Employee flag value in the Payroll module.
  - Tracks additional union fringe detail in through payroll processing.
  - Tracks the contribution type and does not allow editing of union non-cash fringe or stamps earned amounts on the Contribution subtask.
  - Tracks the union non-cash fringe accrual organization and project source code through payroll processing.
  - Tracks stamps earned at the detail level.
  - Tracks timesheet data needed for future paystub reporting.
- The application no longer
  - Uses the pay cycle's **Union/Local** field.
  - Requires or tracks account and org posting information for stamps since they are not posted.

Manage Payroll Records (PRMPTF)

- A new **Union Employee** checkbox displays the Union Employee flag value in the Payroll module.
- The application tracks additional union fringe detail in the payroll processing. New columns were added to the Fringe Detail subtask to show the new data being tracked:
  - Fringe Type
  - Accrual Organization
  - Pay Type Factor
  - Timesheet Line Selection Method
  - Modify Code
  - Rate or Amount Used in Calculation
  - Pay Period Ceiling Amount
  - Contract Ceiling Amount
- The application tracks the contribution type and does not allow the editing of union non-cash fringe or stamps earned amounts on the Contributions subtask.

- On the Contributions subtask, a new **Contribution Type** field displays if the contribution is a cash fringe, a union stamp fringe, or a non-union contribution.
- The Fringe Detail subtask was transferred from the main screen to the Contributions subtask. The application displays this subtask if the **Union Employee** checkbox is selected.
- On the Fringe Detail subtask:
  - A new **Accrual Organization** field was added for tracking of the union non-cash fringe accrual organization through payroll processing.
  - A new **Stamps Earned** field was added for tracking the stamps earned at the detail level.
  - The **Organization** field is now the **Expense Organization** field.
  - The **Amount** field is now the **Non-Cash Fringe Amount** field.
- The application no longer:
  - Uses the pay cycle's **Union/Local** field.
  - Allows you to change the contribution amount for union fringes.
  - Requires or tracks account and org posting information for stamps since they are not posted.
- Audit tracking was added for the EMP_PR_FRNG_DETL table.
- The application now tracks union fringe calculation information.

Manage Employee Earnings History (PRMERF)

- A new **Union Employee** checkbox displays the Union Employee flag value in the Payroll module.
- The application tracks additional union fringe detail in the payroll processing. New columns were added to the Fringe Detail subtask to show the new data being tracked:
  - Fringe Type
  - Accrual Organization
  - Pay Type Factor
  - Timesheet Line Selection Method
  - Modify Code
  - Rate or Amount Used in Calculation
  - Pay Period Ceiling Amount
  - Contract Ceiling Amount
- The application tracks the contribution type and does not allow the editing of union non-cash fringe or stamps earned amounts on the Contributions subtask.
- On the Contribution subtasks, a new **Contribution Type** field displays if the contribution is a cash fringe, a union stamp fringe, or a non-union contribution.
- The Fringe Detail subtask was transferred from the main screen to the Contributions subtask. The application displays this subtask if the **Union Employee** checkbox is selected.
- On the Fringe Detail subtask:
  - A new **Accrual Organization** was added for tracking of the union non-cash fringe accrual organization through payroll processing.
  - A new **Stamps Earned** field was added for tracking the stamps earned at the detail level.

  - The **Organization** field is now the **Expense Organization** field.
  - The **Amount** field is now the **Non-Cash Fringe Amount** field.
- The application no longer:
  - Uses the pay cycle's **Union/Local** field.
  - Allows you to change the contribution amount for union fringes.

Post Payroll Journal (PRPPPCLS)

- Contribution and employer tax expense direct-charging logic was updated.
- The application now:
  - Tracks the **Union Employee** flag value in the Payroll module.
  - Tracks additional union fringe detail in through payroll processing.
  - Tracks the contribution type and does not allow editing of union non-cash fringe or stamp earned amounts on the Contributions subtask.
  - Tracks the contribution type (non-cash fringe, union stamp fringe, or non-union contribution).
  - Tracks the union non-cash fringe accrual organization through payroll processing.
- The application no longer:
  - Uses the pay cycle's **Union/Local** field.
  - Determines the union non-cash accrual organization when posting payroll.

Print Deduction/Contribution/Fringe Report (PRRMBEN)

The employer fringe/tax/contribution posting logic was updated.

Void/Replace Posted Paychecks (PRPAVCK)

The application was updated to support the addition of new columns on the Manage Payroll Records screen and the Manage Employee Earnings History screen. When a V record is generated, the application copies the following values from the voided earnings record to the V payroll record:

V/W Record Column	Source
EMPL_PAYROLL.union_empl_fl	EMPL_EARNINGS.union_empl_fl
EMPL_PR_CNTRB.cntrb_type_cd	EMPL_EARN_CNTRB.cntrb_type_cd
EMPL_PR_TS_INFO.hrly_amt	EMPL_EARN_TS_INFO.hrly_amt
EMPL_PR_TS_INFO.pay_type_fctr_qty	EMPL_EARN_TS_INFO.pay_type_fctr_qty
EMPL_PR_TS_INFO.paystub_additional_amt	EMPL_EARN_TS_INFO.paystub_additional_amt
EMPL_PR_TS_INFO.union_s_fringe_mthd_cd	EMPL_EARN_TS_INFO.union_s_fringe_mthd_cd
EMPL_PR_TS_INFO.union_fringe_rt_amt	EMPL_EARN_TS_INFO.union_fringe_rt_amt

V/W Record Column	Source
EMPL_PR_FRNG_DETL.cash_acct_cd	EMPL_E_FRNG_DETL.cash_acct_cd
EMPL_PR_FRNG_DETL.proj_source_cd	EMPL_E_FRNG_DETL.proj_source_cd
EMPL_PR_FRNG_DETL.accrual_org_id	EMPL_E_FRNG_DETL.accrual_org_id
EMPL_PR_FRNG_DETL.pay_type_fctr_qty	EMPL_E_FRNG_DETL.pay_type_fctr_qty
EMPL_PR_FRNG_DETL.ts_ln_select_mthd	EMPL_E_FRNG_DETL.ts_ln_select_mthd
EMPL_PR_FRNG_DETL.fring_mod_cd	EMPL_E_FRNG_DETL.fring_mod_cd
EMPL_PR_FRNG_DETL.union_fringe_rt_amt	EMPL_E_FRNG_DETL.union_fringe_rt_amt
EMPL_PR_FRNG_DETL.pp_ceil_amt	EMPL_E_FRNG_DETL.pp_ceil_amt
EMPL_PR_FRNG_DETL.ceil_amt	EMPL_E_FRNG_DETL.ceil_amt
EMPL_PR_FRNG_DETL.stamp_earn	EMPL_E_FRNG_DETL.stamp_earn

Update Gender, Race, Benefits Gender, Military Statuses, Military Discharge Date, and Race in ESS Life Events

Costpoint now allows Employee Personal Info screen users to edit the following fields through an ESS life event:

- Preferred Name
- Military Status
- Military Discharge Date
- Suffix
- Race
- Gender

Configure Life Events (AOMESSLE)

You can now select the Employee Personal Info screen from the ESS Module list and select it to be displayed in a life event.

Life Events/New Hires (ESMLIFEEVENT)

If you add the Employee Personal Info screen as a life event on the Configure Life Events screen, the corresponding tab will be available on the Life Events/New Hires Screen. The new tab displays in between the Instructions tab and Address/Phone tabs. Employees can then edit the following fields from the Employee Personal Info tab:

- Preferred Name
- Suffix

- Gender
- Race
- Military Status
- Military Discharge Date (if applicable)

The tab displays the same fields that are available on the ESS Employee Personal Info screen.

Correct Calculation of Negative Manufacturing Order Cost Amount in Labor Applications

The Configure Production Control Settings screen currently provides an **Allowable Negative MO Cost Amount** field where you can specify the negative amount threshold for a manufacturing order cost element or cost total. This functionality also validated the recast timesheet lines generated through the Recast Overtime Premium to Timesheet Lines utility. However, if you entered an **Allowable Negative MO Cost Amount** and used the utility, the application generated a lot of errors or warnings for negative recast lines. Most of the errors were caused by incorrect validations.

To address this issue, the Configure Production Control Settings screen added the **Exclude Recast Overtime TS lines from Neg Cost validation** checkbox, which lets you exclude the recast lines generated by the Recast Overtime Premium to Timesheet Lines screen. When you select this checkbox, it will also exclude recast lines from calculation of totals in other Costpoint Labor applications.

In order to accurately compute the negative MO cost amounts, this release corrects the MO amount calculations and corresponding validations in multiple timesheet applications. Logic in the following applications is now synchronized with the existing validation logic in the Production Control module of the Materials domain:

- Apply Timesheet Adjustments in Batch Mode (LDPAUTO)
- Create Retroactive Timesheet Adjustments (LDPRETRO)
- Create Reversing Timesheets (LDPREVTS)
- Import Timesheets (AOPUTLTS)
- Import Timesheets from Deltek Time and Expense (LDPUPET)
- Manage Correcting Timesheets (LDMCTIME)
- Manage Timesheets (LDMTIME)
- Recast Overtime Premium to Timesheet Lines (LDPROTP)

Attention: For more information on the enhancement on the Configure Production Control Settings screen, refer to the Ignore Negative MO Cost Amount feature under the Materials domain section in this document.

Updates to Internal Security Applications

Existing security applications have updated functionality that will allow you to track internal security as prescribed by your company. This enhancement involves the following applications:

- Manage Internal Security Types
- Manage Internal Security Codes

- Manage Employee Internal Security

Manage Internal Security Types (HPMSECID)

- The Manage Federal Security Codes screen is now the Manage Internal Security Types screen.
- The **Federal Security Code** field is now the **Internal Security Type** field.
- The **Federal Security Description** field is now the **Internal Security Type Description** field.
- The **Internal Security Type Description** field length increased from 30 characters to 100 characters (H_FED_SECURITY.fed_sec_desc).

Manage Internal Security Codes (HPMINTID)

- The **Federal Security Code** field is now the **Internal Security Type** field. If there is only one internal security type value in the H_FED_SECURITY table, the value defaults when you enter an internal security code.
- The **Security Description** field length increased from 30 characters to 100 characters (H_INTRNL_SECURITY.int_sec_desc).
- The new **Deactivation Date** field allows you to indicate when an Internal Security Code becomes inactive and can no longer be assigned to employees.
- You can now enter a search criterion in FIND and QUERY using the **Internal Security Type** field.
- The layout of the screen was updated.

Manage Employee Internal Security (HPMESTAT)

- The screen name was changed from “Manage Employee Security Status” to “Manage Employee Internal Security.”
- The layout of the screen was updated.
- The **Internal Security** field is now the **Internal Security Code** field.
- The new **Internal Security Type** field displays the value that is linked to the specified internal security code.
- The new **Building Name** field displays the value that is linked to the specified internal security code.
- The new **Floor Name** field displays the value that is linked to the specified internal security code.
- The new **Area Name** field displays the value that is linked to the specified internal security code.
- The **Type of Security** field is now the **Notes** field. The field length of the database column of H_EMPL_SEC_STATUS.sec_type increased from 12 to 254 characters.

Time & Expense

This section describes Costpoint 8.2 enhancements for the Time & Expense domain.

Intracompany Work Assignment Enhancements

Related to the new Intracompany Work Assignments feature, which affects multiple areas of Costpoint, Time & Expense was enhanced so that resources who are working as vendor employees for a different company within Costpoint can charge their hours and expenses to work assignment IDs.

Note: See the “Intracompany Work Assignments” section for process and configuration details.

With the addition of new fields related to work assignments, resources who work as regular employees in one company and as vendor employees in another can now enter hours and expenses for both companies on the same timesheet or expense report.

Related administrative applications within Time & Expense were also updated to capture work assignment hours and expenses so that, for example, this information can be committed and exported.

Timesheet Updates

The updates described in the table below are available in both of the following Timesheets applications:

- Timesheet
- Manage/Approve Timesheets

Field or Action	Description
Work Assignment ID	The Timesheet Lines table now displays a **Work Assignment ID** field, where the resource can select or enter the appropriate ID for hours worked on the intracompany work assignment. After you click 🔍, the Lookup displays, which includes all the work assignment IDs available to that vendor employee. After the ID is added to the timesheet, additional fields display related work assignment details, such as the PO ID or PO Release Number, at the end of the row for that charge.
Add Line to Favorites	Similar to regular charge IDs, work assignment IDs can be saved as favorites by clicking **Add Line to Favorites** above the Timesheet Lines table or on the right-click menu of that row. Alternatively, with the charge selected, select the Process menu and click **Action Menu » Add Line to Favorites**. The IDs saved as favorites display in the Work Assignment Favorites dialog box, and when they display in the Lookup, they are highlighted in green.

Field or Action	Description
Work Assignment Favorites	Work assignment IDs added as favorites can be managed by clicking **Work Assignment Favorites** on the **More** drop-down list. The Work Assignment Favorites dialog box offers the same options for managing favorites as the existing Charge Favorites dialog box, which remains available for managing standard charges.
Timesheet Print	When a timesheet contains work assignment charges, the Timesheet report includes a Work Authorization page that displays each work assignment ID, associated details, and hours entered.

Expense Report Updates

The updates described in the table below are available in both of the following applications:

- Expense Reports » Expense Report
- Expense Reports » Manage/Approve Expense Reports

Field or Action	Description
Work Assignment ID	The **Charge Type** drop-down list on both the Default Charges tab and the Add Expense Charge Allocation dialog box was updated to include **Work Assignment** as an option. After the option is selected, the new **Work Assignment ID** field is enabled. After you click 🔍, the Lookup displays, which includes all the work assignments IDs available to that vendor employee. After the ID is added to the expense report, additional fields display related work assignment details, such as the PO ID or PO Release Number, at the end of the row for that charge.
Add Line to Favorites	Similar to regular charge IDs, work assignment IDs can be saved as favorites by clicking **Add Line to Favorites** above the table on the Default Charges tab or on the right-click menu for that row. Alternatively, with the charge selected, select the Process menu and click **Action Menu » Add Line to Favorites**. The IDs saved as favorites display in the Work Assignment Favorites dialog box, and when they display in the Lookup, they are highlighted in green.
Work Assignment Favorites	Work assignment IDs added as favorites can be managed by clicking **Work Assignment Favorites** on the **More** drop-down list. The Work Assignment Favorites dialog box offers the same options for managing favorites as the existing Charge Favorites dialog box, which also remains available for managing standard charges.

Field or Action	Description
Subtask Updates	When expenses are charged to a work assignment, the ID and other related details about the work assignment display on the Charge Distribution subtask, as well as on the Voucher Distribution subtask (only available in Manage/Approve Expense Reports).
Expense Report Print	When an expense report contains work assignment charges, those details are included in the following printed reports: ▪ Expense Report Receipt Traveler ▪ Expense Report Detail

Other Applications Updated

Administrative applications were updated so that they now capture labor and expense details charged to Work Assignment IDs on timesheets or expense reports.

Time

Updated applications within the Time module include:

- Time Utilities » Change Timesheet Status
- Timesheet Interfaces » Export Timesheets

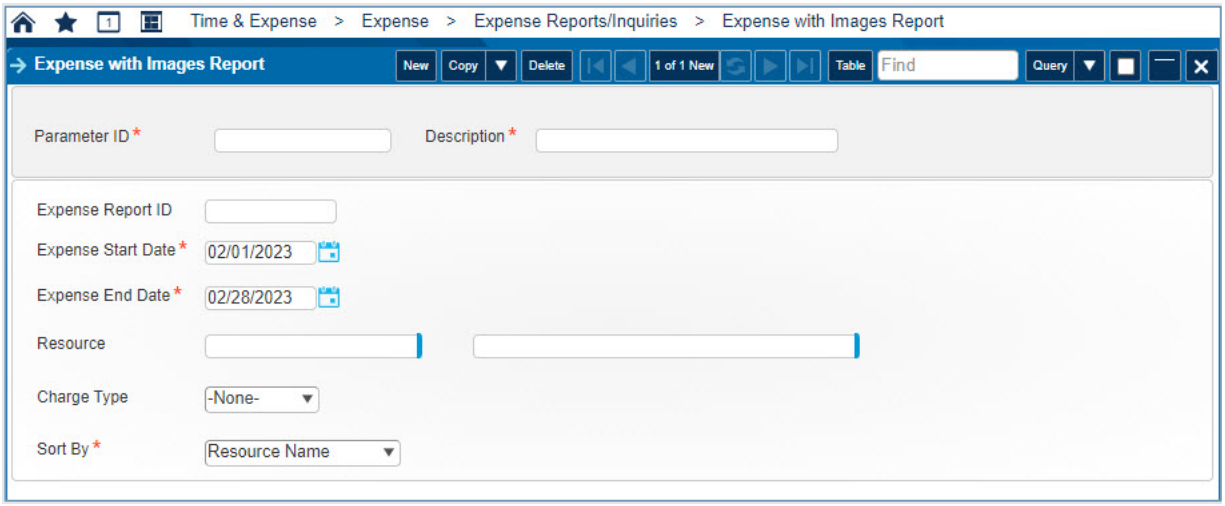
Expense

Updated applications within the Expense module include:

- Expense Utilities » Change Expense Report/Advance Status
- Expense Interfaces »
  - Export ERs/Advances
  - Export Commitments
  - Compute Commitments

New Expense with Images Report

An Expense with Images Report application (**Expense » Expense Reports/Inquiries**) was added that enables you to create billing backup reports for billable expenses.



The screen allows you to filter the results, and receipt images are included for any expense reports where they are available. The images display on the right-hand side of the report, opposite the expense details.

> **Note:** Images are presently limited to the .jpeg, .jpg, .pdf, .gif, and .tiff file formats.

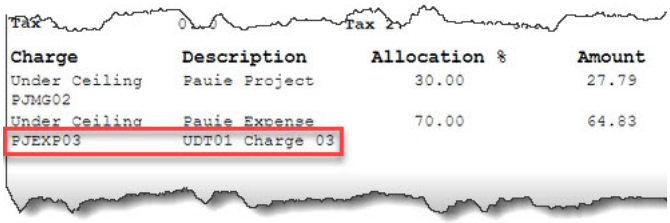
The only required fields are the following:

- **Expense Start Date**: This defaults to the first day of the prior month but can be changed as needed.
- **Expense End Date**: This defaults to the last day of the prior month but can be changed as needed.
- **Sort By**: The report can be sorted by **Resource** or by **Expense Report ID**.

If the report is run with only these three fields selected, the output includes all expense report IDs that fall between the starting and ending dates, and the data is listed according to the **Sort By** option.

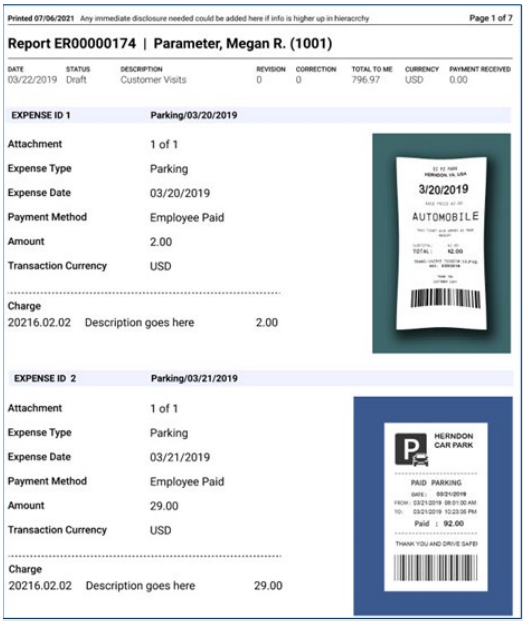
You can filter the results further by selecting additional options as described in the following table.

Microphone Status	Description
Expense Report ID	The report can be run for a specific expense report ID. You must manually enter the ID in this field. When you run the report by ID, all the other fields except **Sort By** are disabled. The report output will include all the expenses included on the selected expense report.
Resource	You can run the report based on a specific resource. The Lookup for this field displays only the list of resources (employees and subcontractors) available to the logged-in user running the report. When this is the only other filter selected besides the required fields, the report will display all the expense reports available for the selected resource within the specified date range.

Microphone Status	Description
Charge Type	You can filter the report by a specific charge ID. Choose from the following options: ▪ **UDT01**: Select this to filter by account ID (UDT 01). Note that the associated charge Lookup displays only account IDs that are not linked to a project. ▪ **UDT02**: Select this to filter by project ID (UDT 02). ▪ **Work Assignment**: Select this to filter by the subcontractor work assignment ID. If you use this field in conjunction with Resource, the charge Lookup is limited to work assignment codes for that resource. If no resource is selected, all the work assignments currently used in Expense display. When you filter based on a specific charge code, the output includes expense reports that used that charge, and the charge is included as a line on the report. For example:  Tax 0 Tax 2 Charge / Description / Allocation % / Amount Under Ceiling PJMG02 / Pauie Project / 30.00 / 27.79 Under Ceiling PJEXP03 / Pauie Expense UDT01 Charge 03 / 70.00 / 64.83

Report Output

The report output displays with transaction details on the left side of the page, such as transaction dates, charge details, merchant information, location, meal attendees, and ceiling amounts. On the right side, images of available receipts or other images attached to the expense report display. For example:



Transaction details from the expense report(s) include:

- Traveler/User
- Transaction Date
- Expense Report ID/Expense Line
- Merchant
- Merchant Location (if available)
- Expense type and associated details:
  - Airline, including Departure Date and Return Date details
  - Hotel, including Check In and Check Out Date, as well as Room Rate and Tax Rate
  - Rental Car, including Rental Pick up and Rental Return date
  - Unit based expense type, including Start Unit End Unit or Number of Unit (Mileage, for example)
  - Entertainment, including Attendees
  - Meal, including Meal Breakout
- Total Amount
  - Unallowable Amount
  - Under Ceiling
  - Over Ceiling
  - Taxes 1
  - Taxes 2
- Charge code, charge description, and amount

Calculate Automatic Overtime Enhancements

Automatic overtime calculation, which was implemented in version 8.1, was updated with additional changes and enhancements described in this section.

Timesheet Classes

This section describes changes to the Timesheet Classes (**Time » Time Controls**) application.

Updates to the Overtime Options Section

The Overtime Options section was moved from the Basic Information tab to the Overtime Hours Rules tab.

In addition, this section now also includes a new **Calculate on Save** checkbox, which is enabled and selected by default if **Overtime Handling** is selected as **Calculate**.

If **Calculate on Save** is selected, overtime is calculated and distributed as soon as the timesheet is saved.

If you clear the checkbox, overtime is not calculated until the timesheet is signed.

Note: In version 8.1, calculation and distribution did not occur until the timesheet was signed.

Updates to Daily and Weekly Overtime

The **Overtime Distribution** field can now be selected as **Weekly**, even if rules for daily overtime rules are configured.

Note: In version 8.1, **Overtime Distribution** defaulted to **Daily** and was not editable if daily overtime was enabled. (**Validation** was set to **Error** or **Warning** under **Daily Overtime Rules**.)

This change allows for improved accommodation of state overtime rules.

Updates to Weekend Overtime Rules

Weekend overtime rules can now be configured even if overtime for seven-day workweeks is enabled.

With this interdependency now removed, the **Validation** field can be selected as **Error** or **Warning** for all the following overtime sections:

- 7th Day Consecutive Overtime
- Saturday Overtime
- Sunday Overtime

Note: In version 8.1, weekend overtime options were disabled when **7th Day Consecutive Overtime** was selected as either **Error** or **Warning**.

Timesheet

This section describes changes to the Timesheet (**Time » Timesheets**) application.

Overtime Now Calculated and Distributed on Timesheet Save

If **Calculate on Save** is selected, overtime is calculated and distributed when the timesheet is saved and can now be reviewed on the Overtime Distribution subtask before the timesheet is signed.

Note: In version 8.1, the Overtime Distribution subtask did not display until the timesheet was signed.

Update to Overtime Validation Routine

Since all overtime rules can now be enabled at the same time, the timesheet validation routine was updated so that rules are applied in the following order:

- **Holiday**: If a timesheet includes non-holiday hours that exceed the overtime thresholds, rules in this section are applied first.
- **7 Consecutive Day Overtime**: If a timesheet includes hours for seven consecutive days that exceed overtime thresholds, this rule is applied second.
- **Saturday Overtime**: If timesheet hours exceed Saturday overtime thresholds, this rule is applied third.

- **Sunday Overtime**: If timesheet hours exceed Sunday overtime thresholds, this rule is applied fourth.
- **Daily Overtime**: If timesheet hours exceed the daily overtime thresholds, this rule is applied fifth.
- **Weekly**: If timesheet hours exceed weekly overtime thresholds but not daily ones, this rule is applied last.

Updates to Pay Type Subtask

The Pay Type Summary subtask now displays the total number of calculated overtime hours broken down according to pay type.

Note: This update was also applied in MR version 8.1.4.

Export Timesheets

Export Timesheets (**Time » Timesheet Interfaces**) was updated so that calculated overtime is available for export only after timesheets are approved, but not after it has been saved or signed.

Note: In version 8.1, overtime was available for export after timesheets were signed.

Interactive Emails in Time Applications

Key applications within the Time module include the new Interactive Email functionality, which enables administrators to send automated reminders directly to the inboxes of designated recipients.

Interactive emails contain details sourced directly from the timesheet, as well as other interactive fields, that enable resources to enter and submit hours from within the email without logging on to Costpoint.

Hours and other changes saved in the email automatically update the real timesheet.

Before you can use this feature in the Time module, it must be globally enabled within Costpoint. For details, see "Interactive Emails" in the General section at the top of this document.

After the feature is enabled, the standard **Email** checkbox in key Timesheet Reports/Inquires screens is replaced by a **Send** drop-down list, which defaults to **None**. To finish enabling the new functionality, you will need to select **Interactive Email** from the drop-down list.

Note: Since the **Send** drop-down list defaults to **None**, regular email notifications are no longer sent from Daily Floor Check until you either re-select **E-mail** or select **Interactive E-mail**.

Interactive emails are configured from these **Time » Timesheet Reports/Inquires** applications:

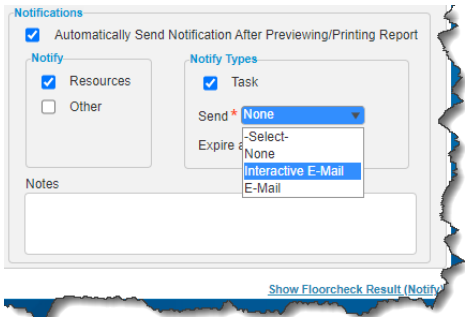
- **Timesheet Reminder**: From this new application, you can configure several reminders, but interactive emails are available only for missing hours, not missing signatures or approvals.

  See the "New Timesheet Reminder Application" section below for information on configuring interactive emails for daily time entry reminders.

- **Daily Floor Check**: Interactive emails for this reminder type can be sent for past or future dates by configuring options located under **Notifications** as follows:

  1. Under **Notifications**, select **Automatically Send Notifications After Previewing/Printing Report** to enable checkboxes under **Notify**.

2. Under **Notify**, select **Resources** and/or **Other** to enable the **Send** drop-down list.

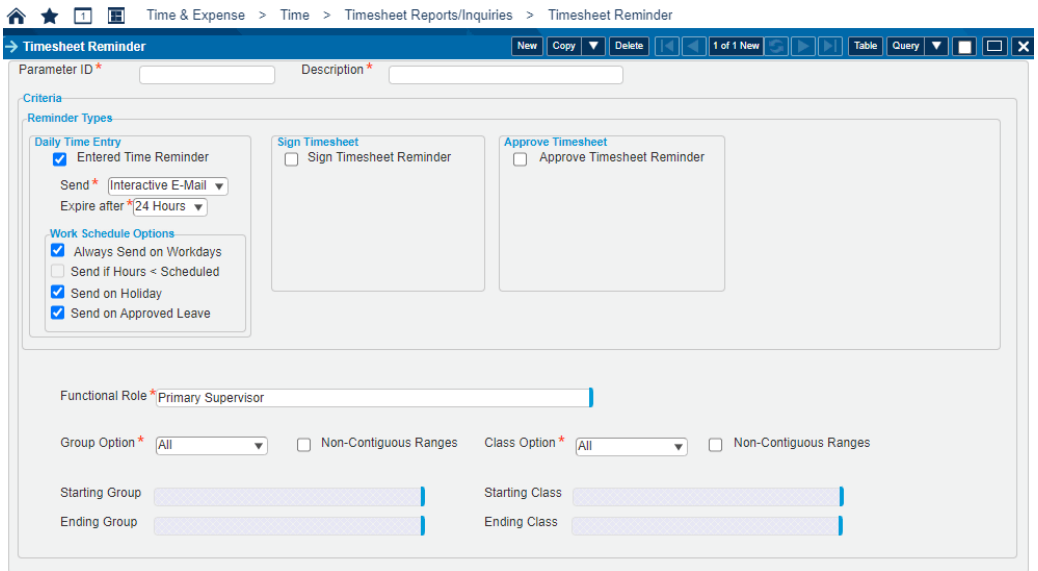


The **Send** drop-down list defaults to **Interactive Email**, and **Expire After** defaults to 24 hours, but you can select different values in four-hour increments up to 24 hours.

> **Note:** A sample interactive email message is included under "Interactive Email Messages" in the Timesheet Reimagined section of this document. See image.

New Timesheet Reminder Application

To help improve compliance with timesheet rules, a new Timesheet Reminder application (**Time » Timesheet Reports/Inquiries**) was added that enables supervisors or administrators to generate automatic email reminders if timesheets have not been saved, signed, or approved.



Types of reminders include:

- **Daily Time Entry**: In this section, select **Entered Time Reminder** to run a check for any timesheets for the current period or current day where hours have not yet been saved. Use settings under Work Schedule to further customize the delivery options.

  The table below describes additional options available under **Daily Time Entry**.

Option	Description
Send	If interactive email functionality is enabled for Time & Expense within Costpoint Administration, the **Email** checkbox is replaced with the **Send** drop-down list. **Attention:** For configuration details, see “Interactive Emails” in the General section at the top of this document. From the **Send** drop-down list, select the type of reminder you want to send. Choose from the following: ▪ **Interactive Email**: Select this option to send an email that is enabled with interactive fields that directly update the timesheet in Costpoint, enabling the recipient to complete the timesheet without logging in to Costpoint. From **Expires After**, choose the number of hours for which the email message will be valid. After that period elapses, the email is no longer editable. ▪ **Email**: Select this option to send an email that includes only a reminder. When this option is selected, resources need to log on to Costpoint to complete the timesheet.
Work Schedule Options	Use options in this section to manage email delivery according to resource work schedules. ▪ **Always Send on Workdays**: Select this option to deliver emails only on workdays. ▪ **Send if Hours are Less Than Scheduled**: Select this option to send the reminder only if the hours entered on the timesheet are less than those scheduled. ▪ **Send on Holiday**: Select this option to send the reminder even on holidays. ▪ **Send on Approved Leave**: Select this option to send the reminder even on days where leave is approved.

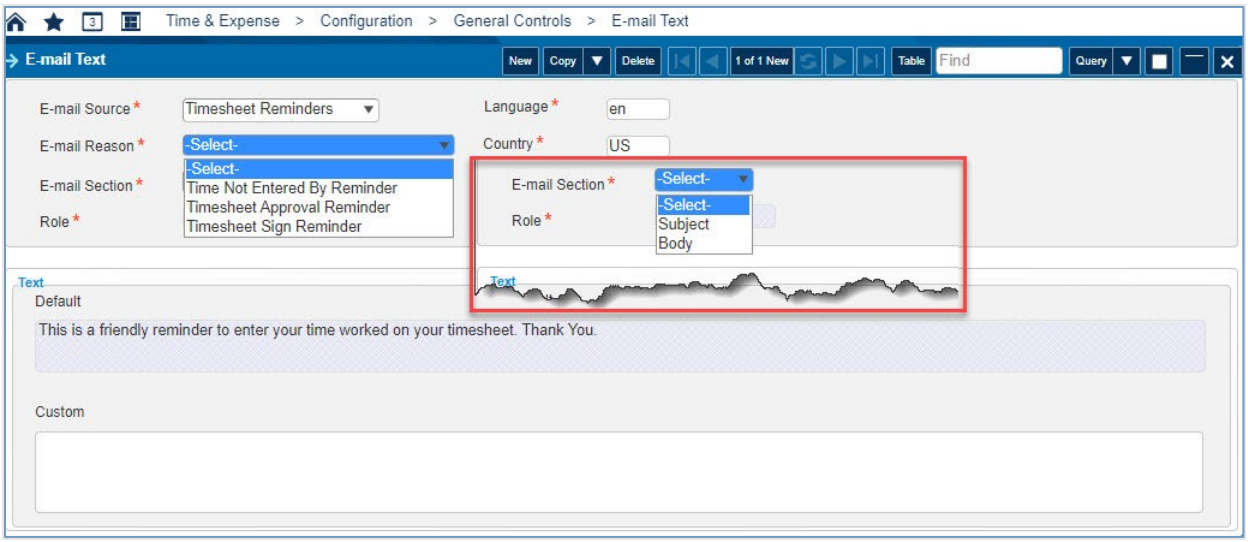
- **Sign Timesheet Reminder**: Select this option to check for timesheets in the current period that are not yet signed.
- **Approve Timesheet Reminder**: Select this option to check for timesheets in the current period that are not yet approved.

Emails can be scheduled for delivery in advance for designated days and times. You can direct email reminders toward groups and classes by functional role or to all groups and classes.

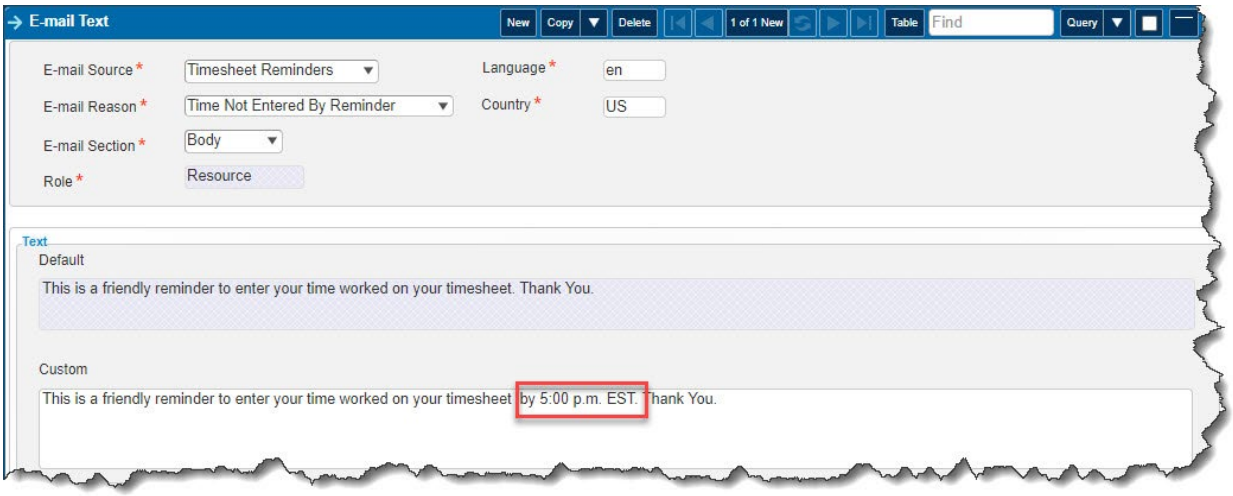
The system-generated emails include default text specific to the reminder type (for example, “Remember to sign your timesheet.”), but the subject line and body text are both customizable. See the “Customize Timesheet Reminder Alerts” section below for details.

Customize Timesheet Reminder Alerts

The E-mail Text application (**Configuration » General Controls**) was updated to include **Timesheet Reminders** as an **Email Source** option. You can customize the subject line and body text of the email for all three types of reminders described above.



For both subject line and body text, you can use the default text, or you can enter customized text in the **Custom** field, as for example, to add the time by which the action must be completed.



Timesheet Reimagined

The Timesheet screen (**Time » Timesheets**) was enhanced with new functionality and other interface updates that accomplish the following objectives:

- Provide a modern look and feel that enhances usability.
- Simplify the time entry process for government contractors.

For example, user interfaces changes, such as new buttons, improved coloring, and dynamic row display, are coupled with new functions, such as the ability to request leave within Timesheet or submit hours by email. Together, these changes create a more efficient time entry process and a better user experience.

Continue reading to learn more about these improvements.

Functionality Enhancements

This section describes enhancements to the Timesheet functionality.

Update to Timesheet Application Default Display

For users who are licensed only for Time or ESS (Employee Self Service), the Timesheet application now displays by default following logon, unless the user designates, or has previously designated, a different default value in Application on the Costpoint logon screen.

Current Day Focus

For Timesheet users with hour cells enabled, the cursor now positions by default in the top cell in the current day column when the application opens. In addition, when you add a new charge line to the Timesheet Lines table, the cursor positions in the current day cell.

Changes to Charge Favorites

Charge Favorites is now accessed from the **More** drop-down list (see also “User Interface Enhancements” below for more information). In addition, the **Add Line to Favorites** button repositioned above the Timesheet Lines table so that it is easier to see when the table includes multiple rows.

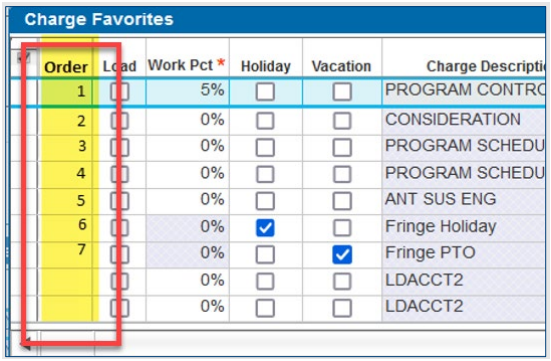
Charge Favorites Loaded and Selected Automatically

When you add a charge to favorites, the **Load** checkbox is now selected automatically so that the charge will automatically load on future timesheets. Therefore, if you do not want a charge to load automatically, you will need to clear the checkbox.

Reorder Charge Favorites

A new **Order** column was added to the Charge Favorites subtask, which enables you to reorder charges by applying a sequence to them so that your most important or frequently used charges display at the top.

For example, to position a charge at the top of the table, enter a 1 in **Order** for that that charge, and if there are other charges you want to display in second, third, or fourth position (and so on), enter the sequence number for those charges.

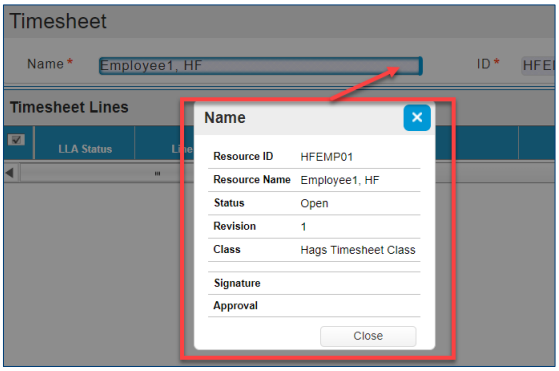


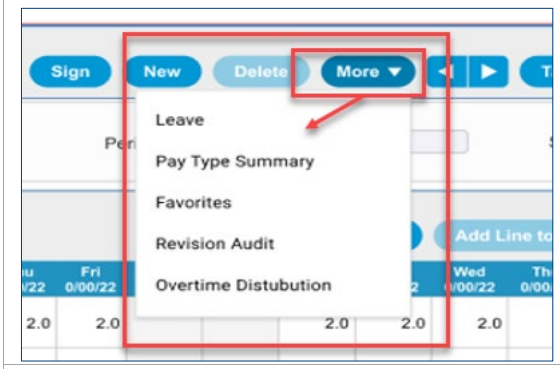
You do not have to sequence all the charges in table. Charges where no sequence number is applied will display starting after the last one that is sequenced. The un-sequenced favorites simply display in order of Account Code or Project Code, whichever is primary.

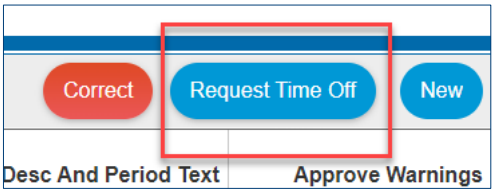
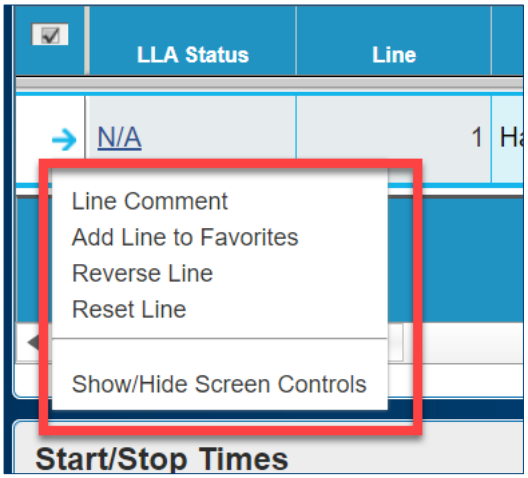
You can enter numbers ranging from 1 to 999 for each charge to indicate the preferred display order.

User Interface Updates

The table below describes the interface updates.

User Interface Enhancement	Description
Streamlined Display for Timesheet Header 	To simplify the Timesheet user interface, the header area was refined to include only the most necessary information. This allows for an enlarged display area for the Timesheet Lines table, making it easier for employees to enter their hours and charges. Accordingly, default header content was reduced to the following essential fields: ▪ (Employee) Name ▪ (Employee) ID ▪ Period ▪ Period Ending ▪ Status
New Info Card Popup Screen  	Fields that were formerly included in the Timesheet header (see the preceding), such as **Class, Org**, and **Status**, are now found in the Info Card, a new popup screen. You can access the Info Card by clicking the information icon that displays when you mouse over the right side of the **Name** or **ID** fields.
Resource Field Renamed to **Name**	The field **Resource**, found in the Timesheet Header, was changed to **Name**. **Note:** This change also applies to the Manage/Approve Timesheets screen. All other applications and reports retain the **Resource** label.
New Timesheet Button Renamed	The **New Timesheet** button, found in the Timesheet Header, was changed to **New.**

User Interface Enhancement	Description
Copy Button Removed	The **Copy** button was removed from the timesheet header. However, the option remains available from the **Line** drop-down list in the Global Menu.
Updates to Timesheet Action Buttons	The Timesheet header area includes an improved and streamlined button display that enables users to quickly access buttons for the most common actions: ▪ Request Time Off ▪ Save ▪ Sign: This button is distinctive for its green color. ▪ Time In/Out or Start/Stop ▪ Correct: This button is distinctive for its red color. Administrators have the option to hide the **Request Time Off** button for specific users and timesheet classes.
Timesheet Informational Options  	The following informational features (in contrast to Action buttons) are now located in the **More** drop-down list: ▪ Leave ▪ Pay Type Summary ▪ Charge Favorites ▪ Revision Audit ▪ Overtime Distribution
Adjustments to Display Opacity	When open dialog boxes display in the foreground, the opacity display for the overall user interface in the background was adjusted so that the interface remains legible without having to close the active dialog box.
Single Errors Highlighted	When only a single error is present, the Timesheet application highlights the field containing that error so that users need not spend time scrolling in search of it.

User Interface Enhancement	Description
Request Time Off from Timesheet Screen  	A new button was added to the Timesheet header that enables you to submit a leave request or enter planned leave without navigating to the Work Schedule/Leave screen. If you are required to request leave, the button name is **Request Time Off**, but if requesting leave is not required, it displays as **New Planned Leave**. The button might be hidden if **Hide Leave Functions** is selected in Timesheet Classes.
Timesheet Lines Display Restricted to Table View Only	Display of the Timesheet Lines table is confined to Table View. Accordingly, the **Form** button was removed. In addition, the **Timesheet Lines** drop-down list was reordered to: ▪ Line Comment ▪ Add Line to Favorites ▪ Reverse Line ▪ Reset Line 

Display Updates

This section describes changes that improve the readability of the timesheet display.

- **Dynamic Timesheet Lines**: Timesheet rows and cells now display information in an enlarged, easier-to-read font. However, the display is also dynamic so that if many lines are present, the display and font are adjusted, so more rows display.

- **Time Entry Table Cell Updates**: All cells in the Timesheet entry table were augmented with extra blank pixels to promote legibility of numbers and text displaying within the cells.
- **Updated Font Display for Headers**: Font styles and the alignment of header titles were updated with a goal of enhanced readability and a cleaner visual appearance.
- **Modifications to the Timesheet Lines Table Display**: Selected elements in the Timesheet Lines table were updated to promote visual clarity and ease of use. Changes include:
  - Colors in the headers and footers were updated.
  - Horizontal lines were removed from the Total section.

Updates to Line Functionality

This section describes line functionality improvements, such as the removal of deleted lines.

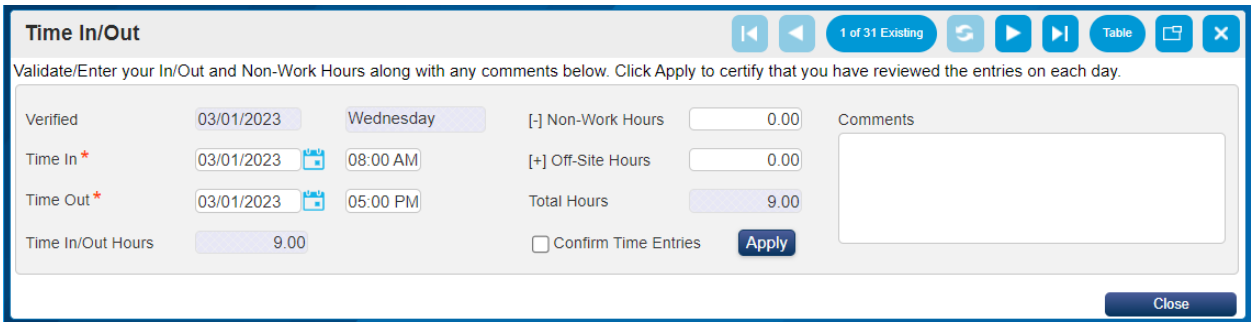
The table below includes descriptions of similar changes to other applications within the Time module.

Application/Subtask	Screen Behavior
Timesheet	After you delete a line and click **Save**, the line no longer displays. The remaining lines are re-sequenced in the correct numerical order, and the deleted lines, which are now hidden, are assigned a rank of 0. These changes are recorded on the Revision Audit subtask.
Timesheet Start/Stop Detail Subtask	Hidden and deleted timesheet lines no longer display on this subtask.
Export Timesheet	Deleted lines are not removed but instead display zero amounts in the Export or Print report.
Daily Floor Check	Daily Floor Check ignores hidden lines when performing floor checks.
Timesheet by Charges Report	Deleted or hidden lines are excluded from the Timesheet by Charges Report.

Time In/Out Interface Updates

This section describes improvements made to the Time In/Out subtask, which include the following:

- Spacing between fields was tightened to reduce the amount of blank space and improve readability.
- The **Comments** field was relocated from the bottom of the subtask box to the right side.
- The option to switch between Table and Form view was restored.



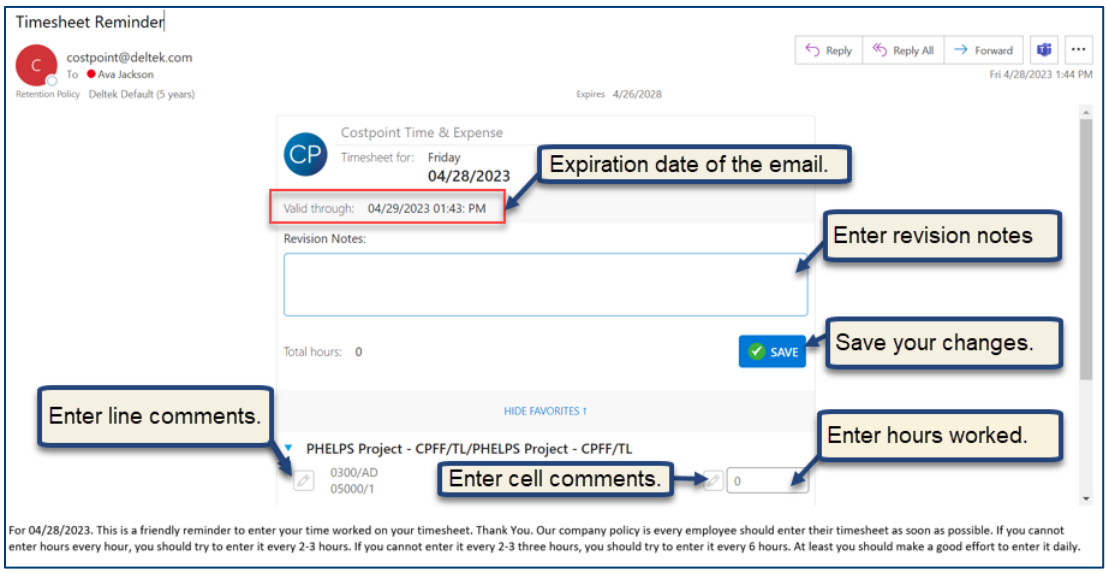
Interactive Email Messages

Interactive emails are reminder messages (sent via email) that contain fields that correspond to the timesheet form. Upon receiving an interactive email, you can enter missing hours directly within the body of the email. The messages are valid for up to 24 hours depending on configuration.

After you click SAVE within the email, the same changes are applied to the timesheet within Costpoint.

These automated emails can be sent according to a designated schedule, reminding you of missed time entry deadlines. The body of the email includes details sourced directly from the timesheet, as well as other interactive features that enable the resource to conveniently enter and submit hours from within the email, without having to log in to Costpoint.

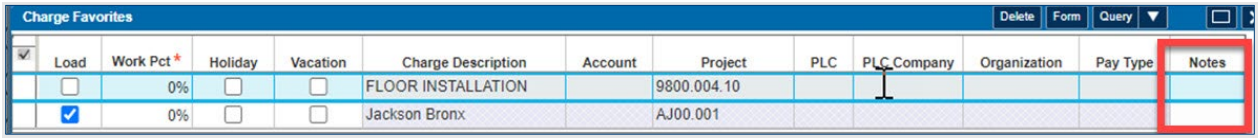
The image below provides an example of the fields and options that display in the body of the email.



(Return to the "New Timesheet Reminder Application" section.)

Notes Column Added to Charge Favorites

The **Notes** column was added to the **Time » Timesheets » Charge Favorites** subtask table. Users can enter notes into this field to help them track multiple charges that they use on various projects. The field allows up to 4,000 characters.



Break Rule Functionality Enhancement

Time Entry now offers the ability to set a rule for breaks by timesheet class (except Standard), validate timesheets against the break rule, and run an inquiry to verify break statuses.

Timesheet Class Configuration Options

This section describes updates to the Timesheet Classes application (**Time » Time Controls**).

Configure the Break Rule

The Regular Hours Rules tab now includes a new **Maximum Hours Before Break Warning** field under a new **Break Rules** section. Use this field to specify the maximum number of hours that members of the selected timesheet class are allowed to work before taking a break.

Since breaks are only tracked for the Start/Stop and Time In/Out entry methods, this field is disabled if the **Entry Mode** is selected as **Standard**.

> **Note:** If **Entry Mode** is selected as either **Attendance Required** or **Attendance Optional** (Time In/Out), **Track Lunch Start/End** on the Miscellaneous tab of the Time Settings (**Time » Time Controls**) must also be selected.

Hours entered in the field are validated against the timesheet when it is saved, and a warning is given if a break was not logged during the specified period.

If the user dismisses the warning and saves the timesheet without logging a break, the action is added to logged warnings, unless the break is entered later and the timesheet is re-saved.

> **Note:** This field can also be configured in conjunction with the new **Enable Paid Breaks** setting for any of the Start/Stop Time modes. See “Paid Break Tracking for Start/Stop Time” for details.

Update Custom Text for Time In/Out

A new Custom Text subtask was added that enables you to modify the default instructions that display at the top of the Time In/Out subtask of Timesheet application (**Time » Timesheets**).

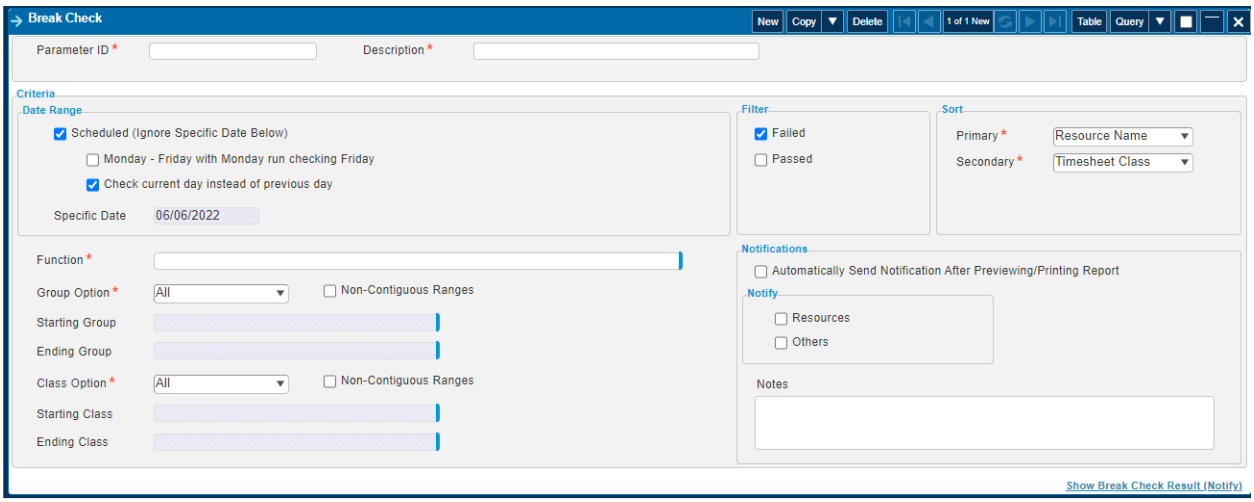
> **Note:** This subtask is presently enabled only if **Entry Mode** is selected as either **Attendance Required** or **Attendance** (Time In/Out).

The text you enter in the Custom box will display at the top of the Time In/Out subtask of the Timesheet application (**Time » Timesheets**).

Select the **Suppress** checkbox to hide either type (default or custom) screen instructions.

New Break Check Report/Inquiry

A new Break Check application (**Time » Timesheet Reports/Inquiries**) was added that enables supervisors and administrators to confirm whether resources have complied with break requirements when entering timesheets.



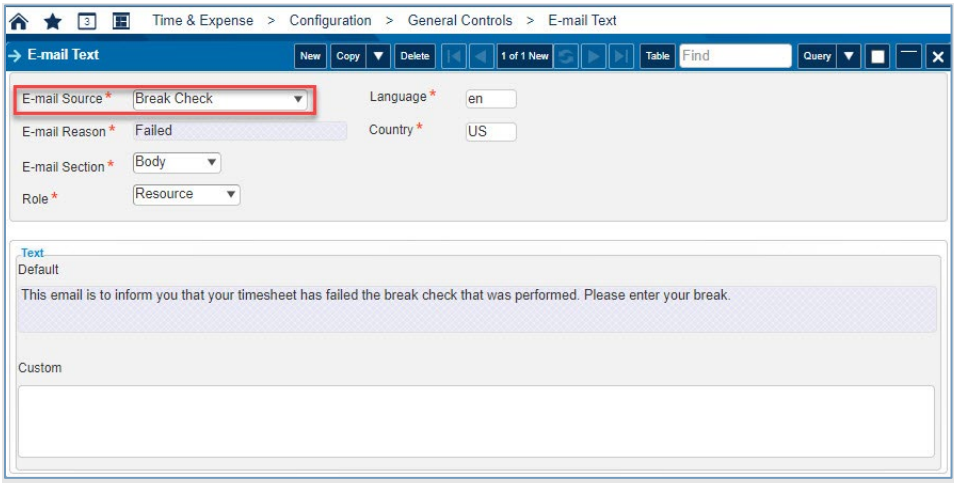
Similar to existing inquiries, such as Daily Floor Check, the Break Check inquiry can be run manually as needed and also scheduled to run automatically.

To learn more about using this screen, see the online Help for **Time » Timesheet Reports/Inquiries » Break Check**.

If you enable notifications, resources that fail the break check are sent an auto-generated email. See “Break Check Alerts” below for details on customizing the default text of these notifications.

Break Check Alerts

The E-mail Text application (**Configuration » General Controls**) was updated to include **Break Check** as an **Email Source** option.



If notifications are enabled on the Break Check report (**Time » Timesheet Reports/Inquiries**), emails sent following a break check inquiry include the default text that displays on this screen.

You can customize the subject and body text by first selecting that section (from **E-mail Section**), and then for either role (Resource or Supervisor), enter the text in the **Custom** field and save your changes.

To learn more about using this screen, see the online Help for **Configuration » General Controls » E-mail Text**.

Paid Break Tracking for Start/Stop Time

Time Entry now offers the ability to set rules for tracking paid breaks for Start/Stop Time, which is the entry method used for tracking breaks, meals, and charge details.

Changes to the Time module for this feature include updates to:

- Timesheet class configuration
- Pay type configuration
- Timesheet entry and validation

Configuration Updates and Requirements

This section describes new settings related to enabling and configuring paid break tracking, which includes configuring the pay type that will be used to record paid breaks on the timesheet.

Timesheet Class Configuration Requirements

Paid breaking tracking is enabled from the Timesheet Classes (**Time » Time Controls**) application, as described in the following sections.

Enable Paid Breaks

The Basic Information tab of Timesheet Classes now includes an **Enable Paid Breaks** checkbox under **Entry Options**.

This new checkbox is enabled when **Entry Mode** (also under **Entry Options**) is set to any of the following Start/Stop Time options:

- Break Tracking
- Start/Stop Summary
- Start/Stop Detail

To enable tracking of paid breaks, select the **Enable Paid Breaks** checkbox, which is clear by default.

In addition, from the Pay Types subtask, you must also add the pay type that resources will select when entering breaks on the timesheet.

> **Note:** See “Pay Type Configuration Requirements” below for more information.

Set Maximum Hours Before Break

In conjunction with paid break tracking, you may optionally use the new **Maximum Hours Before Break** field on the Regular Hours Rule tab. See configuration details under “Break Rule Functionality Enhancement” for information.

Pay Type Configuration Requirements

The UDT 10 (Pay Types) application (located under **Configuration » Master Data**) includes a new **Valid for Paid Breaks** checkbox.

Select this checkbox on any new or existing pay type that will be used by resources when recording paid breaks on the timesheet.

As described in the previous section, the pay type must also be added to the Pay Type subtask on the **Time » Time Controls** screen for that timesheet class.

Break Tracking on the Timesheet

This section describes changes to the Timesheet (**Time » Timesheets**) application.

To track paid breaks on the timesheet, the resource selects a Paid Break pay type when entering the break period on the Start/Stop Time subtask.

Validation of Paid Breaks

During validation of timesheets, hours entered using a pay type that has been configured as valid for paid breaks are counted as hours worked. If overtime is automatically calculated, paid break entries are also counted as hours worked.

Updates to Print Timesheet

The Timesheet Report was updated to include timesheet details related to paid breaks.

Break Check Inquiry

A new Break Check application (**Time » Timesheet Reports/Inquiries**) was added that enables supervisors and administrators to confirm whether resources have complied with break requirements when entering timesheets.

For information on this application, see “Break Rule Functionality Enhancement” in these release notes.

Updates to Line-Level Workflow Events

The workflow for rejecting regular or correcting timesheet hours on a line-level basis in the Approve Timesheet Charges application (**Time » Timesheets**) was improved for the project manager role.

For example, after a timesheet charge line is rejected and the change is saved, the employee can now receive a workflow notification.

Add Line-Level Approval to Events Application

To enable the workflow notifications to be triggered when a line is rejected on the Approve Timesheet Charges screen, the Workflow Events screen (**Time » Time Controls**) was updated with these options:

- Reject Regular Timesheet Hours
- Reject Correcting Timesheet Hours

These options become available when the **Project Manager** option is selected in the **Actor** field.

After the workflow event is set up, and the project manager rejects either regular or correcting hours in the Approve Timesheet Charges application, the employee will receive the notification.

Line-Level Approval Email Text

To enable the rejection notifications associated with line-level charges, the **Email Source** drop-down list includes a new **Line Level Approval** option. When this option is selected, **Email Reason** displays the text associated with the notification (Rejected Line Level Approval). This text is not editable.

Updates to Resource Activity Report

When you print the Resource Activity Report from the Resource Activity application (**Time » Timesheet Reports/Inquiries**), it now includes additional charge details, and when applicable, work assignment IDs.

Timesheet Status Notifications

To enable administrators to send notifications concerning rejected timesheets, as well as create custom email texts for those notifications, new functionality was added to the following applications:

- Timesheet Status (**Time » Timesheet Reports/Inquiries**): A **Rejected** option was added to the **Notify For** drop-down list.
- Workflow Events (**Time » Time Controls**): A **Timesheet Rejected at Status Check** option was added to the **Action** drop-down list, which supervisors can select to initiate a workflow event.
- E-mail Text (**Configuration » General Controls**): A **Rejected** option was added to the **Email Reason** drop-down list, which supervisors can select as the reason for the email notification.

Leave Enhancement

Leave functionality within the Time module was enhanced to allow administrators to hide leave-related interface options, as well as provide them with added control over the display of leave type codes.

Other updates include:

- Leave notifications now display the number of hours that are requested or planned.
- The label of the button that opens the New Leave dialog box in either Work Schedule or Timesheet is dynamically updated based on configuration of the timesheet class.
- The Work Schedule/Leave application was renamed to Work Schedule.

Configuration Updates in Timesheet Classes

This section describes changes to the Timesheet Classes (**Time » Time Controls**) application.

New Option for Hiding Leave-Related Buttons

A **Hide Leave Functions** checkbox was added to the Basic Information tab under **Schedule Rights**.

Select this checkbox if you want to hide the button used for entering leave on the interface of the Work Schedule and Timesheet applications.

> **Note:** If you select this checkbox, **Must Request Leave** is automatically cleared and disabled.

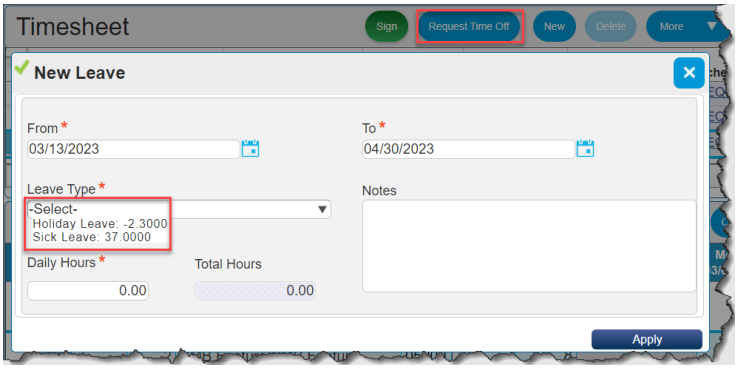
Overview of Enhancements to the Leave Type Subtask

The Leave Type subtask includes two new columns: **Allow Leave Request** and **Do Not Track Leave Balances**. (See the sections below for additional details.)

Both settings provide added control over which codes display on the **Leave Type** drop-down list of the New Leave form when resources open it from the following applications under **Time » Timesheets**:

- Work Schedule
- Timesheet

The image below provides an example of typical leave type codes as displayed from the New Leave form:



Note: The list of available leave types is already limited to the codes that are linked on the Leave subtask. The new options allow you to further limit the list according to other factors that are described below.

Hide a Leave Type Code

Note: If you upgraded from version 8.1.17 or later, this setting was already available to you.

The new **Allow Request Leave** checkbox is selected (checked) by default, indicating that the leave code will display on the **Leave Type** drop-down list. Clear the checkbox if you do not want the code to display.

Display Leave Type Codes Where No Balance Exists

The new **Do Not Track Leave Balances** checkbox is clear (not checked) by default, and leave balances are tracked automatically. When leave balances are tracked, the leave type code will display only if a beginning balance or adjustment is found.

Select the checkbox if you do not want to track leave balances so that the code displays on the **Leave Type** drop-down list even if no balance or adjustment is found.

Note: This setting can be configured independently of **Allow Request Leave**, but if that checkbox is clear, the leave type code will not display.

Application Renamed

The Work Schedule/Leave application (**Time » Timesheets**) was renamed to Work Schedule.

Leave-Related Interface Updates for End-Users

This section describes updates that affect how the button related to leave functionality displays for resources who use the following applications under **Time » Timesheets**:

- Work Schedule
- Timesheet

Updates described in this section affect both applications above.

Note: Leave and leave requests could previously be entered only from Work Schedule. With the release of 8.2, this same ability is now available from Timesheet. See the "Timesheet Reimagined" section of these release notes for more information on the addition of leave functionality to that application.

Button Label and Display Now Based on Timesheet Class Configuration

The label of the button used to submit leave is now dynamically updated based on the state of the **Must Request Leave** checkbox on the Basic Information tab of the Timesheet Classes screen. For example:

State of Must Leave Checkbox	Button Label in Work Schedule or Timesheet
Selected	Request Time Off
Clear	New Planned Leave

Alternatively, if **Hide Leave Functions** is selected on the Basic Information tab, then the button used for entering or requesting leave is hidden on the Timesheet and Work Schedule applications.

In Work Schedule, these other leave-related options are also hidden:

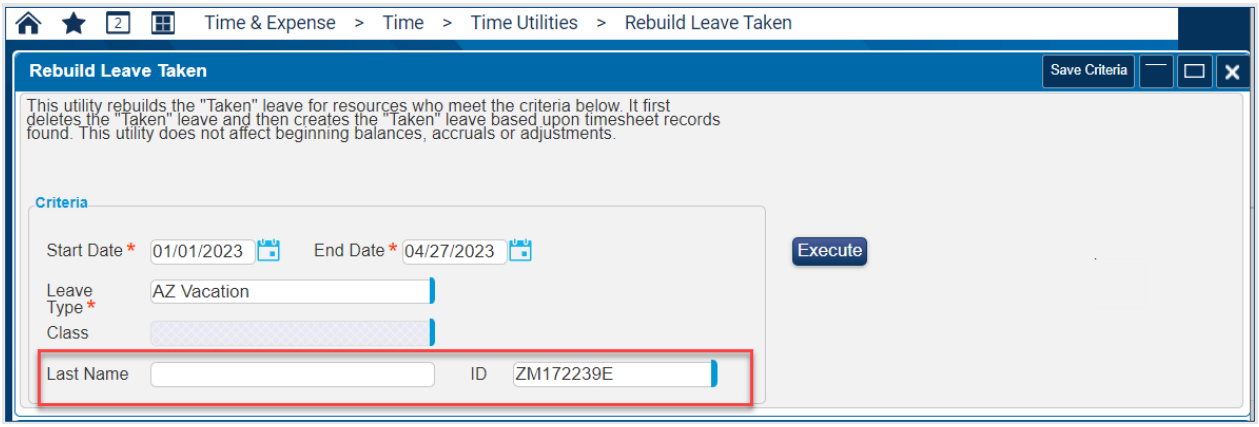
- The legend that explains leave colors
- The buttons used to check leave balances and requests
- The **Leave** column in Edit Daily Schedule

Updates to Leave Request Notifications

When a resource requests leave, the email notification sent by workflow now includes the number of hours that were requested, providing an audit tracking method for supervisors when they review the hours later during timesheet approval.

Rebuild Leave Taken Utility Updated

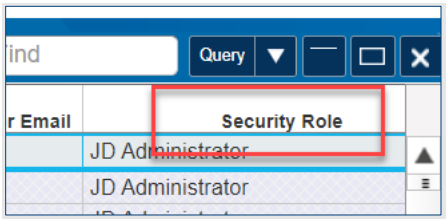
The Rebuild Leave Taken utility (**Time » Time Utilities**) was updated to enable supervisors and administrators to run the rebuild leave function for an individual employee or select number of employees, rather than solely for an entire timesheet class. For example, it can be used when an individual employee changes timesheet class.



The utility also creates an output report that contains updated leave balances.

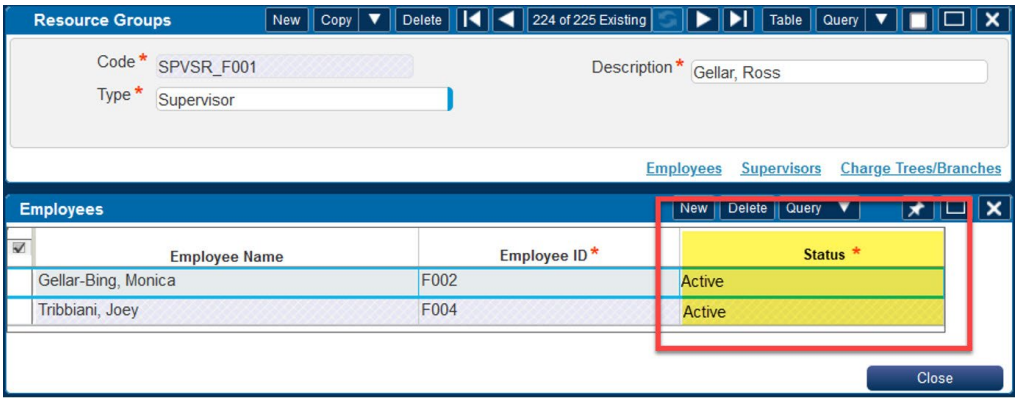
Update to Resource Information Screen

The Resource Information screen (**Configuration » Resources**) includes a new **Security Role** field that enables supervisors to quickly identify employees who are assigned to a particular role. The new field displays in Table View only.

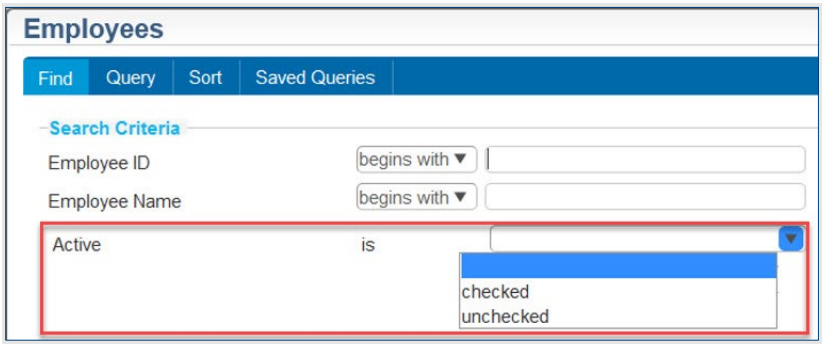


New Status Column Added to Employees Subtask

To enable administrators to filter out inactive employees when providing supervisors lists of employees who report to them, a **Status** column was added to the Employees subtask on the **Configuration » Resources » Resource Groups** screen.



In addition, an **Active** status filter was added to the query function on the Employees subtask.



The **Active** field drop-down list includes two options:

- **Checked**: Select this option to filter your query results only for employees with a status of Active.
- **Unchecked**: Select this option to query for both Active and Inactive employees. You can also leave the field blank. A blank field is the default selection.

Update to the Clear Timesheets Screen

To enable supervisors to easily clear timesheets for specific employees, the query function of the Clear Timesheets screen (**Time » Time Utilities**) includes two new values:

- Last Name
- Employee ID

This update eliminates the need to scroll the entire list when searching for the employee.

New Check for Work Schedule Changes Option

A new **Check for Work Schedule Changes** option was added under Miscellaneous on the Basic Information tab of the Timesheet Classes screen (**Time » Time Controls**).

If you select this checkbox, Time & Expense checks the **Work Schedule** field of the Resource History subtask (**Configuration » Resources » Resource Information**). If this value changes during the pay period, the new work schedule is applied to the timesheet for the day it was added.

As a result, time entries for users with work schedules that change within a pay period are validated for the day they enter them.

Updates to General Configuration

The Integrations Settings tab of the General Settings screen (**Time & Expense » Configuration » General Controls**) was updated to prevent ITAR restrictions from being applied to non-Cloud customers.

This update ensures that customers who are using Manufacturing and Time & Expense will be able to select either **Use Build Part ID** or **Use Build Part Description** from the **Manufacturing Order Name** drop-down list.

Mobile Time and Expense-Related Updates

The following topics include enhancements to the Costpoint Mobile Time and Expense application.

Note: The official name of the application is *Costpoint Mobile Time and Expense*. This document uses it only at the first mention. Succeeding instances of the application name display *Costpoint Mobile T&E*.

In addition, the application name in the *Apple App Store* and *Google Play Store* displays *Costpoint Time and Expense*.

Note: The version number appended to each feature title is explained as follows:

- **7.1+**: The feature is available to users of Costpoint 7.1.x, 8.0.x, 8.1.x, and 8.2.x.
- **8.0+**: The feature is available to users of Costpoint 8.0.x, 8.1.x, and 8.2.x.
- **8.2+**: The feature is available to users of Costpoint 8.2 and higher.

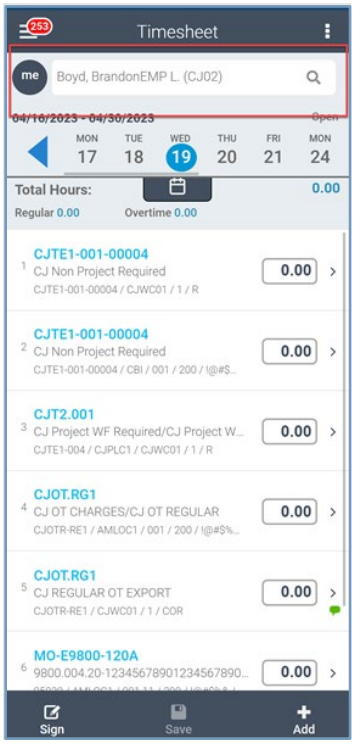
Support for Proxy Functionality (8.2+)

Beginning with Costpoint Mobile T&E version 2.3, proxy permission is available for users of Costpoint 8.2 and higher, allowing resource managers or backup resource managers to perform time and expense entry for other resources.

Note: Proxy permission is set by your system administrator for your Timesheet Group Class and functional role rights through Costpoint Time and Expense (Web).

Mobile Time Access for Proxy Users

If you are logged into Costpoint Mobile T&E with a proxy user role, the **Resource** field displays on the Timesheet screen.



Resource Field on the Timesheet Screen for Proxy Users

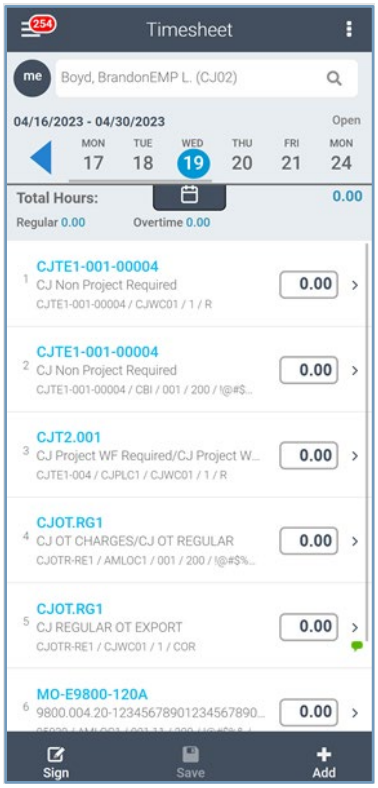
Tapping next to the **Resource** field displays the Resource screen, which displays all resources for whom you are designated as a proxy.

Resource Screen for Proxy Users

As a proxy user, you can choose the resource on whose behalf you are acting by:

- Scrolling through the list of resources.
- Tapping **Search Name** to search for resource by name.
- Tapping **Search ID** to search for resource by ID.

After you tap a resource, the Timesheet screen refreshes, and the timesheet information of the selected resource based on the timesheet period becomes available to you.



Timesheet Screen for Proxy Users

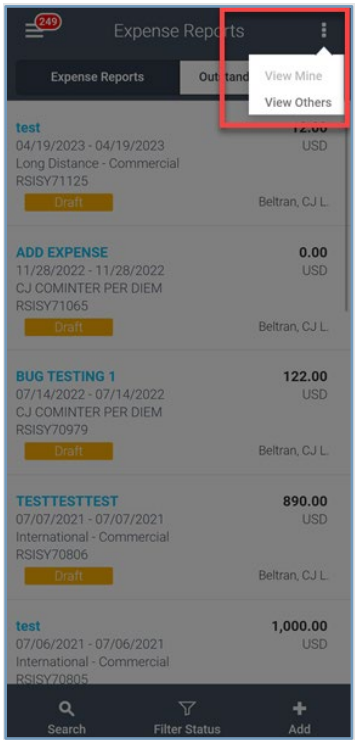
You can create, edit, and sign timesheets as you normally would if you were managing your own timesheets, if the role permits.

Tapping refreshes the Timesheet screen with your own timesheet.

> **Attention:** See "Mobile Time Access for Proxy Users" in the *Costpoint Mobile Time and Expense User Guide* for more information about this feature.

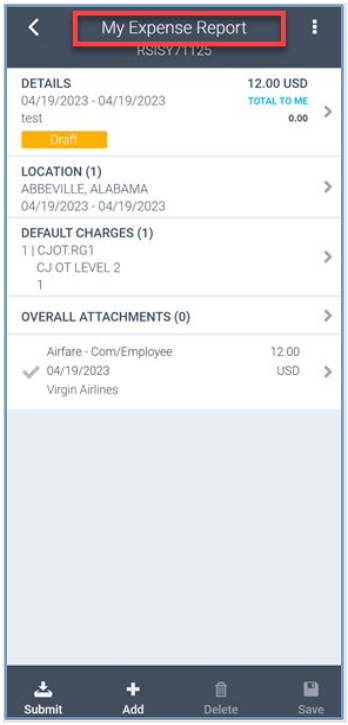
Mobile Expense Access for Proxy Users

If you are logged into Costpoint Mobile T&E with a proxy user role, displays on the Expense Reports screen, with the following options:



Expense Reports Screen for Proxy Users

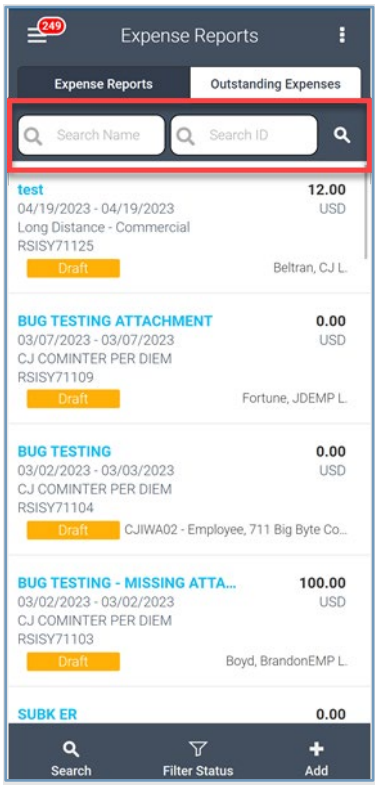
- **View Mine**: This option is enabled if you are viewing other resources' expense reports. Tapping this option refreshes the Expense Reports screen with the list of your own expense reports. When you tap an entry, the screen header displays **My Expense Report**.



View Mine–Expense Report Screen

- **View Others**: This option is enabled if you are viewing your own expense reports. Tap this option to view and access other resources' expense reports.

  When you tap **View Others**, the **Search Name** and **Search ID** fields display on the Expense Reports screen, just below the Expense Reports and Outstanding Expenses tabs.

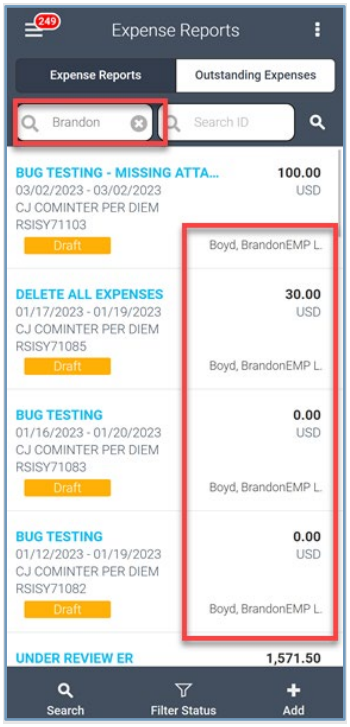


View Others–Expense Reports Screen

As a proxy user, you can choose among the resources for whom you are designated as a proxy by:

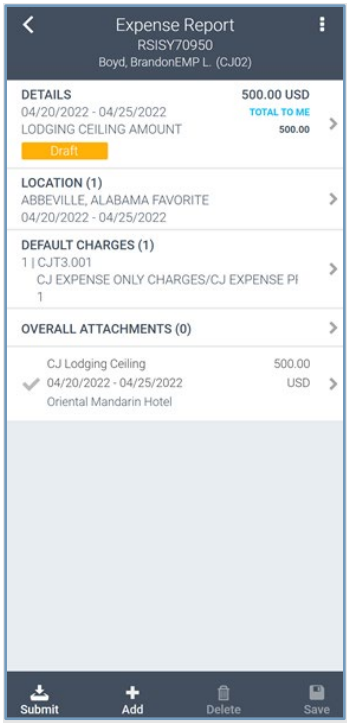
- Scrolling through the list of expense reports.
- Tapping **Search Name** to search for resource by name.
- Tapping **Search ID** to search for resource by ID.

After selecting a resource, the Expense Reports screen refreshes with the selected resource's expense reports on the Expense Reports tab.



View Others–Expense Reports Screen

After tapping an entry, the expense report information becomes available to you. You can create, edit, and submit expense reports as you normally would if you were managing your own expense report, if the role permits.



View Others–Expense Reports Screen

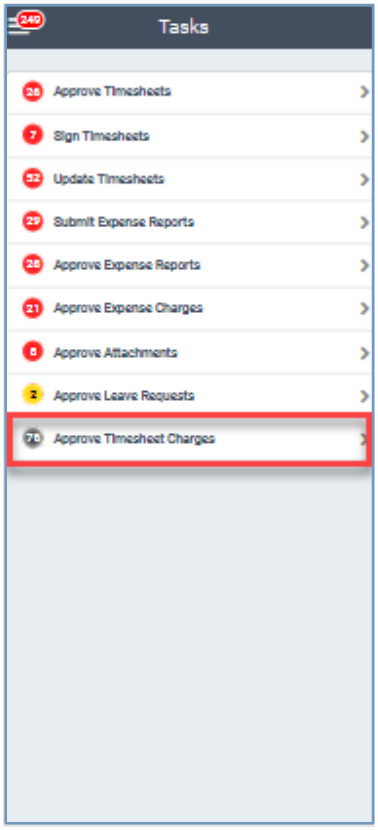
Note: Capturing and accessing other resources' outstanding expenses is currently not supported. The Outstanding Expenses tab always displays the expense list of the logged-in resource.

Attention: See "Mobile Expense Access for Proxy Users" in the *Costpoint Mobile Time and Expense User Guide* for more information about this feature.

Support for Timesheet Line–Level Approval (8.2+)

Resource managers can now review, approve, and reject lines on resource timesheets through the Costpoint Mobile T&E application instead of a browser-based Timesheet screen.

A new task called **Approve Timesheet Charges** is added to the Tasks screen. This task category is displayed and available only for resource managers that do not have rights to resources' timesheets but do have rights to approve timesheet charges.



Approve Timesheet Charges on the Tasks Screen

Tapping **Approve Timesheet Charges** displays the timesheet charge on the Review screen. Each timesheet charge displays the following details:

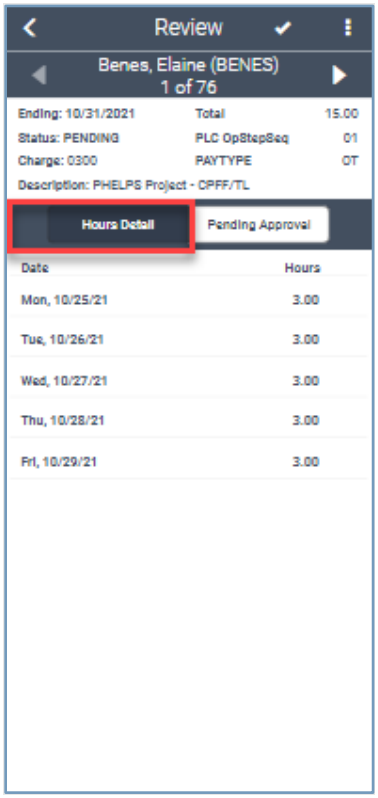
- Resource User Name
- Timesheet period ending date
- Status of the selected charge (which is always Pending)
- Charge code

- Charge description
- Total hours submitted for that timesheet charge, which include the regular charge hours and any overtime charge hours
- UDT07–PLC (If available)
- UDT10–Pay Type
- UDT 01–Project (For subcontractors only)
- UDT 02–Project ID (For subcontractors only)
- Work Assignment ID

The number of timesheet charges for approval is displayed on the header, below the resource name. Tap or to navigate between the timesheet charges.

Attention: See "Review Screen" in the *Costpoint Mobile Time and Expense User Guide* for more information.

The Review screen contains two tabs: the Hours Detail tab and the Pending Approval tab.

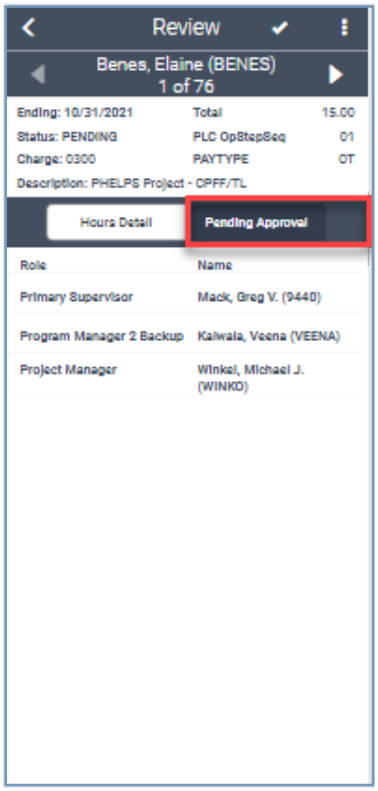


Hours Detail Tab

The Hours Detail tab displays a breakdown of the hours entered per timesheet line within the timesheet period ending date.

- The Cell column displays the date for the submitted timesheet charge.
- The Hours column displays the number of hours submitted for the timesheet charge for that date.

Note: Cost-only charge is indicated by an asterisk (*).



Pending Approval Tab

The Pending Approval tab allows you to see other resource managers who also have rights to approve or reject the timesheet charge.

You may perform the following tasks on the Review screen:

- To approve a timesheet charge, perform one of the following actions:
  - Tap , and tap **Approve**.
  - Tap .
- To reject a timesheet charge, tap , and tap **Reject**.

Attention: See "Approve a Timesheet Charge" and "Reject a Timesheet Charge" in the *Costpoint Mobile Time and Expense User Guide* for more information.

Improved Favorites Functionality

The following enhancements are added to the Costpoint Mobile T&E application to further improve the Favorites functionality.

Support for ICWA Charge (8.2+)

Beginning with version 2.3, Intra Company Work Assignment (ICWA), a new charge type added to Costpoint 8.2, is also supported in the Costpoint Mobile T&E application.

Favorite Charge Rules Updates for New and Existing Timesheets (8.1+)

The rules for charge favorites for new and existing timesheets have been updated to match the rules in Costpoint Time and Expense (Web).

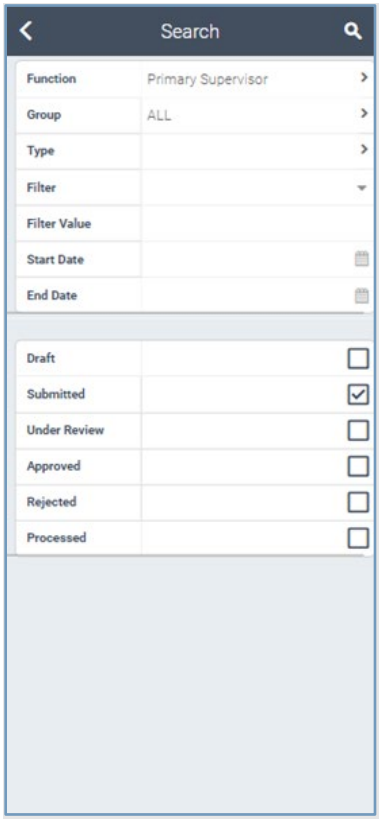
Screen	Action	Behavior
Add Charge Screen	Add a charge from the Favorites list on the Charge Lookup screen	▪ The **Favorite** field is set to **On** and disabled. ▪ The **Autopopulate** field is disabled and defaults to the charge favorite setting.
Add Charge Screen	Add a charge from the All Charges list on the Charge Lookup screen	▪ The **Favorite** field is set to **Off** and enabled. ▪ The **Autopopulate** field is set to **Off** and disabled. If you are using Costpoint 8.1.13 and higher: ▪ If you set the **Favorite** field to **On**, the **Autopopulate** field is automatically set to **On**. When you tap **Done** on the Add Charge screen, the charge is saved as a favorite and becomes available in the Favorites list even if the timesheet is not saved.
Edit Charge Screen	Edit an existing charge with the timesheet line derived from a favorite	▪ The **Favorite** field is set to **On** and disabled. ▪ The **Autopopulate** field is disabled and defaults to the charge favorite setting. ▪ If you change one of the UDTs, the **Favorite** field is set to **Off** and enabled, and the **Autopopulate** field is set to **Off** and disabled.
Edit Charge Screen	Edit an existing charge with the timesheet line <u>not</u> derived from a favorite	▪ The **Favorite** field is set to **Off** and enabled. ▪ The **Autopopulate** field is set to **Off** and disabled. When you tap **Done** on the Edit Charge screen, the charge is saved as a favorite and becomes available in the Favorites list even if the timesheet is not saved. If you are using Costpoint 8.1.13 and higher: ▪ If you set the **Favorite** field to **On**, the **Autopopulate** field is automatically set to **On**.

Ability to Perform Expense Report Approvals Using the Search Screen (8.0+)

You can now use the Search feature of the Costpoint Mobile T&E application to perform expense report approvals, if you have rights to view and approve expense reports.

If your role is backup resource manager, you can use the mobile application to approve expense reports instead of approving them through Costpoint, even if there are no tasks created for you—that is to say, the approval is not performed on the Tasks screen but through the Search screen.

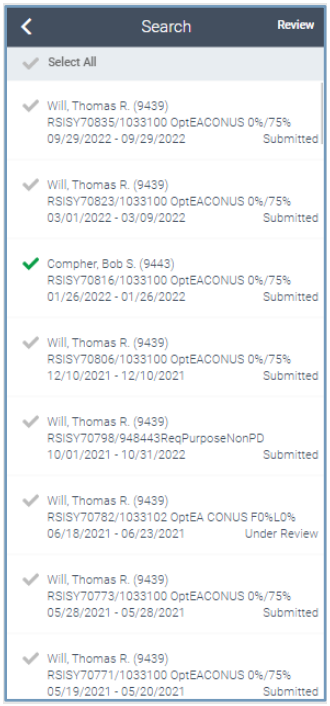
On the Search screen, specify the search criteria to search for the expense reports of your group, regardless of the expense report status.



Expense Report Search Screen

Attention: See "Expense Report Search" in the *Costpoint Mobile Time and Expense User Guide* for more information about the fields on this screen.

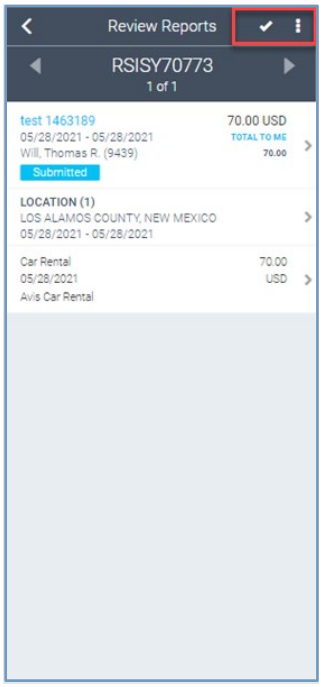
When the application displays the expense reports that match the criteria you specified, tap the checkmark next to the expense reports that you want to view.



Expense Report Search Results

On the Review Reports screen, perform one of the following actions to approve an expense report:

- Tap ✔.
- Tap ⋮, and tap **Approve**.



Review Reports Screen

Costpoint Mobile T&E displays a message that the expense report is approved. If there is a problem with the expense report, Costpoint Mobile T&E displays errors and warnings. You must first resolve the errors to approve the expense report.

Attention: See "Search Expense Reports" and "Approve an Expense Report" in the *Costpoint Mobile Time and Expense User Guide* for more information.

User Interface Enhancements (8.0+)

This section provides information about minor adjustments and improvements to the Costpoint Mobile T&E interface.

Screen Display and Login

The table below provides information about minor adjustments and improvements related to screen display and login.

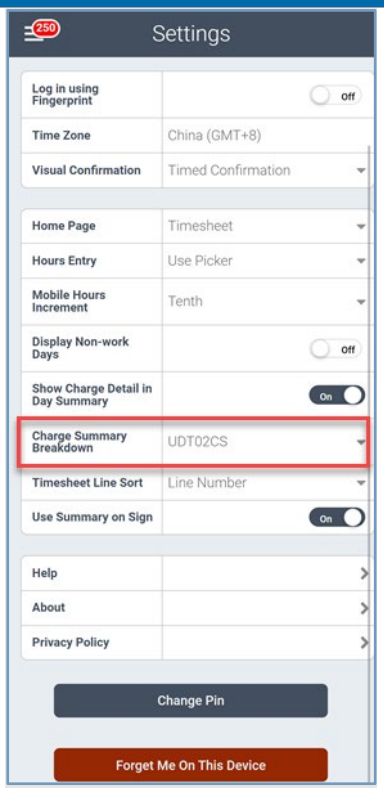
Enhancement	Description
Set the Minimum Screen Resolution Supported on Mobile Devices	For mobile devices, the supported screen resolution for the Costpoint Mobile T&E application has been set to 320 X 512, at the minimum. The application displays a notification to adjust the resolution if your device does not meet the minimum requirement.
Notification Displayed During Login When Costpoint Web Password Has Expired	Costpoint Mobile T&E now displays a message during login when your password in Costpoint Time and Expense (Web) has expired.

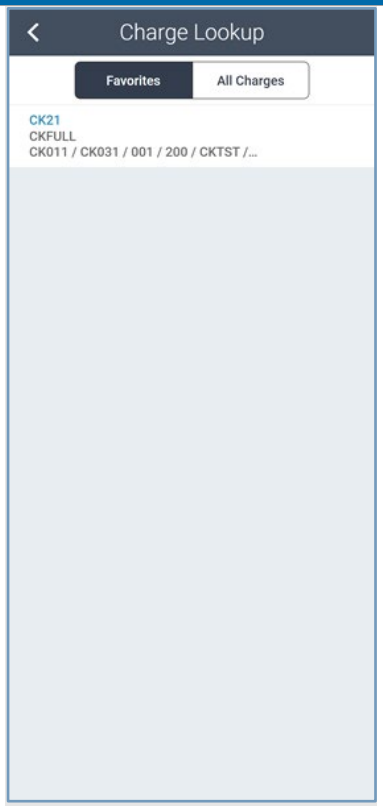
Time

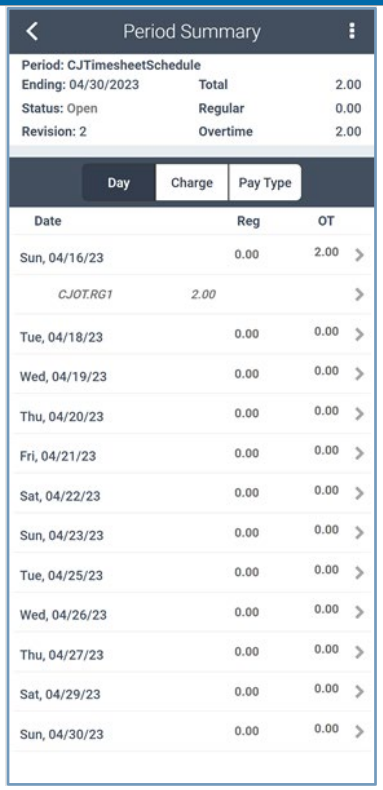
The table below provides information about minor adjustments and improvements to the screens on the Time menu.

Enhancement	Description
Timesheet Search Results Screen UI Improvements	The following enhancements were made to the Search Results screen: ▪ The search results are now sorted in reverse order, with the newest timesheet displayed on top. ▪ The timesheet list is now aligned to the left and uses check marks instead of checkboxes. ▪ The timesheet status is now color-coded based on the status.

Enhancement	Description
	 Timesheet Search Results Screen
Displayed PLC on the Timesheet Summary Screen	If Project Labor Categories (PLCs) are assigned to the same charge code, you can now select how to group the charge detail lines through the **Charge Summary Breakdown** field on the Settings screen. Your options are: ▪ **UDT02** ▪ **UDT02/UDT01** ▪ **UDT02/UDT07** ▪ **UDT02/UDT01/UDT07**

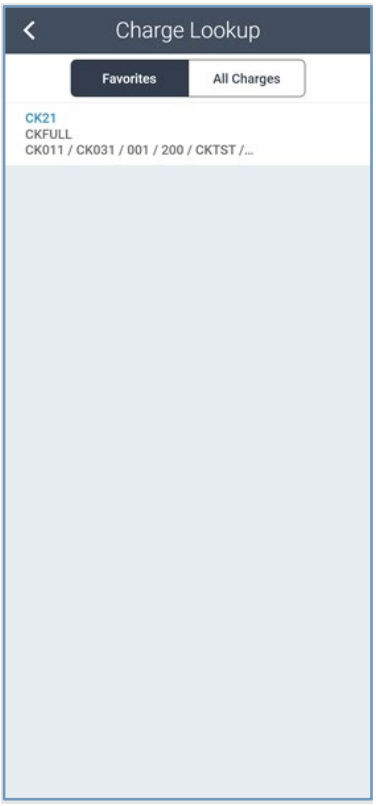
Enhancement	Description
	 *Charge Summary Breakdown Field* Based on the selected group, the charge detail lines will be displayed as a separate line instead of being rolled up under the charge code on the Charge tab on the Timesheet Summary screen. By default, the charge detail lines are grouped by **UDT02**. This means each unique UDT02 charge line is displayed on the Charge tab on the Summary screen. If you tap and select **UDT02/UDT01**, a unique combination of UDT02/UDT01 charge line is displayed on the Charge tab.
Lookup Screen Renamed to Charge Lookup Screen	The Lookup screen that displays when adding a charge to a timesheet has been renamed to **Charge Lookup**.

Enhancement	Description
	 *Charge Lookup Screen*
Log Out Progress Indicator	When logging out of the Timesheet Entry or Timesheet Approval screen, the Costpoint Mobile T&E application now displays a logging out progress indicator. *Logging Out Progress Indicator*
Revised Message Displayed for the Clear Button on the Time In-Out Screen	When you tap the **Clear** button on the Time In-Out screen, Costpoint Mobile T&E now provides information on the action to be performed. The confirmation message now displays as follows: "This will clear all entries on the screen. Do you want to continue?"
Timesheet Schedule Displayed on the Summary Screen Header	The timesheet schedule, previously displayed on the Day tab of the Summary screen, has been moved to the header of the Summary screen.

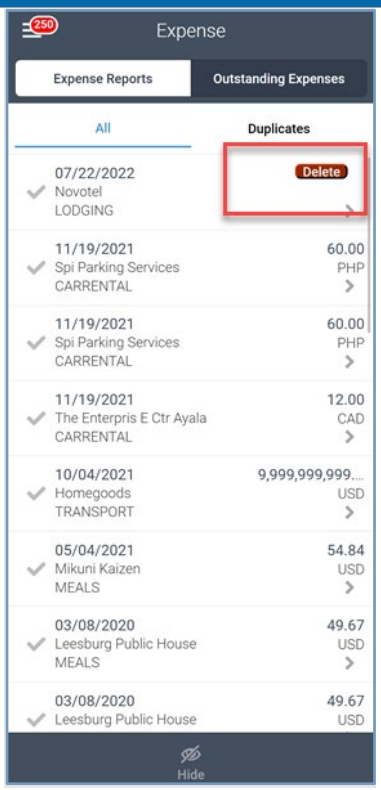
Enhancement	Description
	 *Period Summary Screen*

Expense Reports

The table below provides information about minor adjustments and improvements to the screens on the Expense Reports menu.

Enhancement	Description
Lookup Screen Renamed to Charge Lookup Screen	 *Charge Lookup Screen*
Expense Reports Search Results Screen UI Improvements	The following enhancements were made to the Search Results screen: ▪ The search results are now sorted in reverse order, with the newest expense report displayed on top. ▪ The expense report status, previously displayed below the dates, is now displayed to the right of the dates. ▪ The check mark next to the expense report is now aligned to the left.

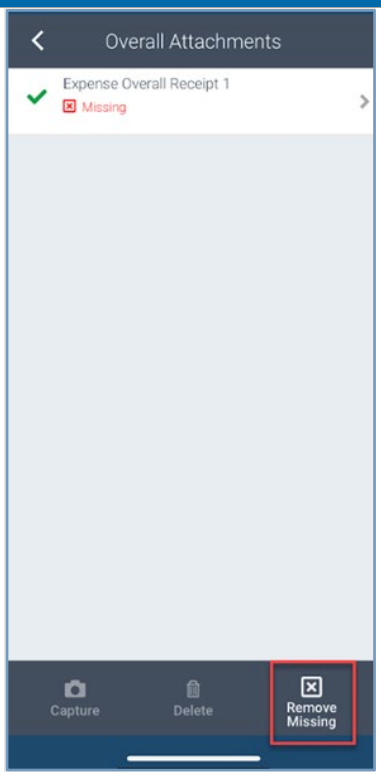
Enhancement	Description
	 Expense Reports Search Results Screen
Delete Manually Entered Outstanding Expenses	Costpoint Mobile T&E now allows you to delete manually entered outstanding expenses. On the Outstanding Expenses tab, when you swipe a manually entered outstanding expense, the **Delete** button becomes available.

Enhancement	Description
	 *Outstanding Expenses Tab*

Capture Receipt

The table below provides information about minor adjustments and improvements to the screens on the Capture Receipt menu.

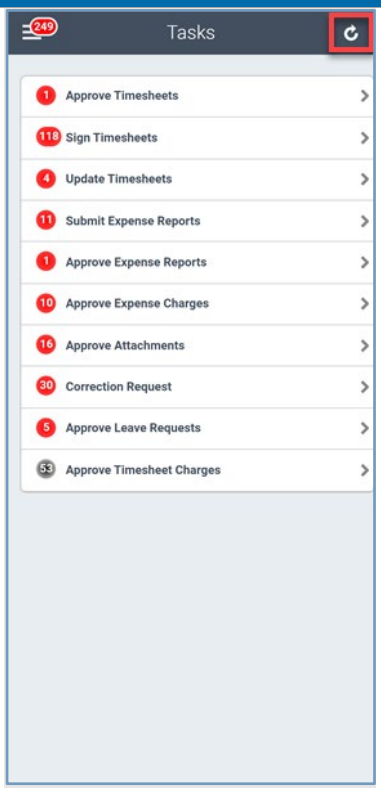
Enhancement	Description
Attach a Receipt to an Expense Report or Expense Attachment Marked as Missing	Costpoint Mobile T&E now allows you to attach a receipt to an expense report or a claimed expense line with an attachment type marked as **Missing**. On the Attachments or Overall Attachments screen, tap the attachment marked as **Missing**, and tap the **Remove Missing** button located at the bottom of the screen. Tap the same attachment again to enable the **Capture** button, allowing you to capture or select an image to attach.

Enhancement	Description
	 *Overall Attachments Screen*

Tasks

The table below provides information about minor adjustments and improvements to the screens on the Tasks menu.

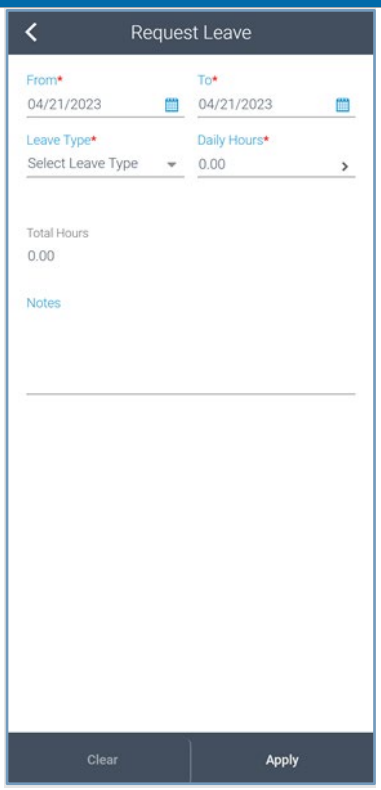
Enhancement	Description
Refresh Button	The Refresh icon has been added to the Tasks screen to allow you to update the list of tasks and counts after you complete a task.

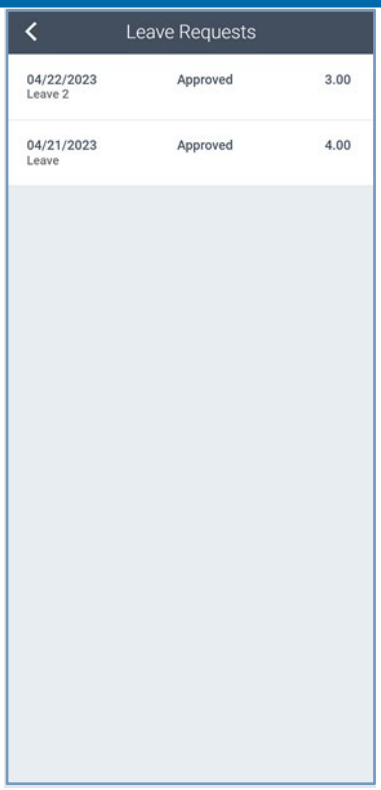
Enhancement	Description
	 *Tasks Screen*

Leave

The table below provides information about minor adjustments and improvements to the screens on the Leave menu.

Enhancement	Description
Request Leave Screen UI Improvement	The alignment of the fields has been updated for a cleaner visual appearance.

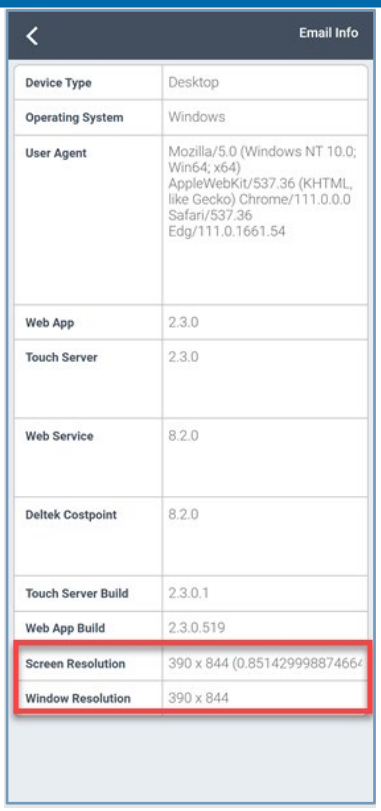
Enhancement	Description
	 *Request Leave Screen*
Leave Requests Screen UI Improvement	The alignment of the fields has been updated for a cleaner visual appearance.

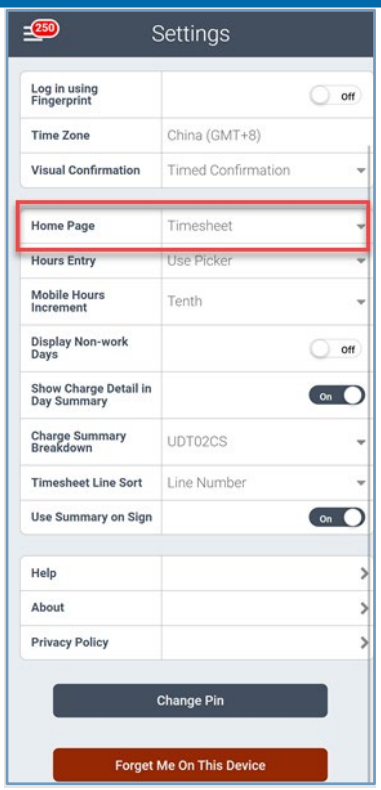
Enhancement	Description
	 *Leave Requests Screen*

Settings Screen

The table below provides information about minor adjustments and improvements to the Settings screen.

Enhancement	Description
Screen and Window Information Added to the About Field	The screen and window information has been added to the **About** field on the Settings screen.

Enhancement	Description
	 *About Field*
Login Field Renamed to Home Page	The **Login Page** field has been renamed to **Home Page**.

Enhancement	Description
	 *Home Page Field*

Turn off Landscape Mode When Accessing the Application on Mobile Phones (7.1+)

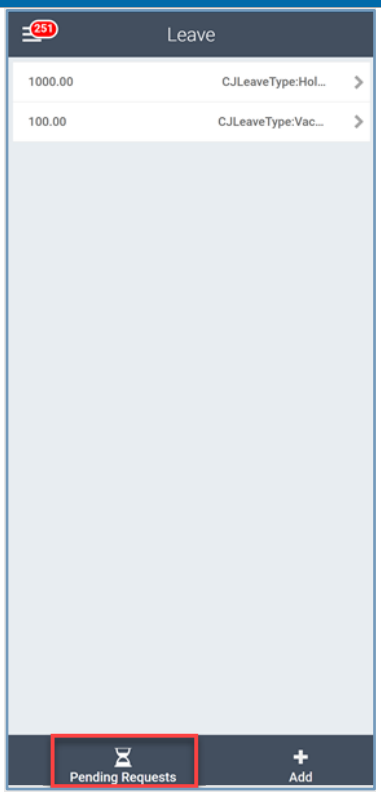
In order to have a better user experience when accessing the Costpoint Mobile T&E application on a mobile phone running on iOS or Android, the Landscape mode is turned off, and your mobile phone screen is locked to Portrait mode.

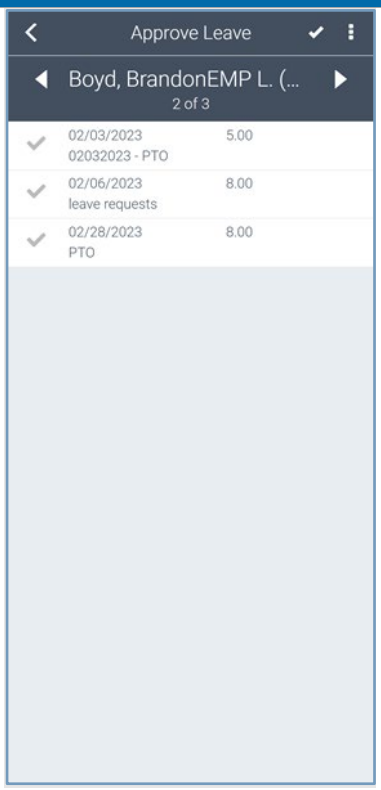
However, if you are accessing the application on a tablet computer, you can switch your screen orientation.

Leave Request Functionality Updates

The table below provides information about the updates made to the Leave Request functionality.

Enhancement	Description
Leave Screen Update	The **Balance** icon has been renamed to **Pending Requests**, and the icon has been updated accordingly.

Enhancement	Description
	 *Leave Screen*
Approve Leave Screen Update	The information displayed on the Approve Leave screen has been refined to include only the most necessary information.

Enhancement	Description
	 *Approve Leave Screen*

Mobile Security Updates (8.0+)

This section includes security-related updates in this release.

Support for PHP 8.1.16

The Costpoint Mobile T&E Server has been upgraded to support PHP 8.1.16.

Apache Cordova for Android

This release includes the upgrade of Cordova-Android version 10.1.2 to provide several improvements and fixes for Android.

Removed Tracking Through Google Analytics

The application tracking through Google Analytics has been removed.

With this update, the **Usage Tracking** field on the Settings screen and the Usage Statistics Tracking screen during login have been removed accordingly.

Remove Email URL Population (7.1+)

To comply with the new mobile application security requirements, the feature to populate the Costpoint Mobile T&E Server URL via email when logging on to the application for the first time is no longer supported beginning with Costpoint Mobile T&E version 2.3.

Note: If you attempt to use this feature going forward, the Costpoint Mobile T&E application will display the "unspecified error" message and will automatically close.

Reports & Analytics

This section describes Costpoint 8.2 enhancements for the Reports & Analytics domain.

Streamlined Reports & Analytics Menu

The Reports & Analytics menu navigation has been streamlined to reduce the number of clicks when launching an application. In addition, the BI Configuration module has been renamed to BI Controls to align with the naming convention in other domains.

Costpoint Business Intelligence

Project Role Security Support in Costpoint BI

When the **Project Roles Security** field is set to **Yes** on the Manage BI Settings screen, users who are in the CER__ROLE_SEC group and who have an assigned role to a project will now have access to its data. When org security is enabled, a user must have org rights to the project as well as a role on the project to get access. Any user not assigned to the CER__ROLE_SEC group will have access to project data based on their org security setup only. The assigned roles for these users should also be configured on the Manage Functional Roles screen, where the **BI** checkbox is selected."

Project Role security expands secured access to other roles beyond the existing Project Manager (PM) security. If you have PM security applied on the following packages, Project Role security is a better option.

- Accounts Receivable
- Project Reporting
- Smart AI

This enhancement affects project reports that come out of the box.

A new user group, CER ROLE_SEC - CER Role Security Group, is now available to support Project Role Security. Users assigned to this group will see only projects where they have been assigned a role.

To easily transition users from the CER PM_MGR user group to the new CER ROLE_SEC user group, the User Group Rights Report has been updated to match the user setup on the Manage User Groups screen.

Organization Security for CRM & Contracts

The CRM & Contracts model now supports Organization Security.

If Organization Security has been configured on the Manage BI Settings screen, users of the CRM & Contracts model will see only opportunity and contract management records of the organizations to which they have been assigned.

If module security is enabled, Costpoint BI will apply the contracts and opportunities profile in validating the data to show to users. Costpoint BI also checks for the organization that has been assigned to the user. If an organization has not been assigned, the records for the owning organization will be displayed.

Overall Improvements in Costpoint BI

Several changes were made to improve the usability experience in Costpoint BI.

- Page numbering has been improved in reports where the cover page and history were excluded in the page count.
- The reports, packages, and user groups now have descriptions.
- You may have been granted access rights to some reports that are within inaccessible folders or areas of Costpoint BI due to your role. With the improved object security, system administrators can now set up shortcuts to access those reports regardless of the folder location. Key fields in the secured packages are now visible.
- Some reports now use the secured packages for better performance. You will see the list of modified reports as listed in the succeeding sections in their specific Costpoint BI area. While the original legacy reports are still available, Deltek recommends to use and migrate to the newer versions that utilize the secured packages.
- The number of clicks needed to launch an application has been reduced.

New Packages and Content in Costpoint BI

New Costpoint BI packages, dashboards, and reports for this release are summarized in this section.

New Human Resources Package

A new Human Resources (HR) package that includes key tables from the Costpoint People domain is now available.

The HR package supports model security, which is set up in Costpoint BI, where data- or row-level restrictions apply based on Costpoint settings. This package is also compatible with newer BI functionality, like dashboards.

The following reports use this new HR package:

- VETS 4212 Report
- EE01 Report
- Employee Benefits Profile
- Benefit Enrollment Report

New Payroll Package

The Payroll package includes key tables that support payroll reporting needs.

When model security is enabled on Costpoint BI, data- or row-level restrictions based on Costpoint settings apply. As with most recently introduced Costpoint BI packages, this supports BI functionality, such as dashboards.

The Earnings Report uses this new Payroll package.

New Billing Package

The new Billing package uses Dynamic Query Mode (DQM), which has several technical benefits that are required to leverage some of the newer BI features. such as dashboards and data modules.

To find out more about DQM, see the IBM website.

If model security is enabled in Costpoint BI, this package supports Project Role and Object security based on your Costpoint user settings.

Repointed Reports in Costpoint BI Billing

Some reports were repointed to the Billing package of Costpoint BI.

The following reports now use the Billing package:

- Aged Open Billing Detail
- Milestone Invoice
- Pre-Bill Report
- Standard Invoice Backup
- Zero Rate Billing Exception Report

New Fixed Assets Package

The new Fixed Assets Package uses Dynamic Query Mode (DQM) as well, which makes it compatible with the BI features that let you create dashboards and data modules.

The Fixed Assets Report uses this new Fixed Assets package. On this report, you will see the total cost, accumulated depreciation, book value data, as well as the percentage of the asset that has already been depreciated.

Inventory Dashboard

The Inventory Dashboard is now available. This dashboard has components such as Inventory Turnover, On Hand Vs Reserved Inventory, Count Accuracy, and Location Count Status.

New User Groups

Costpoint Business Intelligence 8.2 is now available to support Project Role Security and the addition of several user groups.

The new user groups are:

- **CER Billing Secure – CER__BILL_SECURE**: This is an object security group used to grant permissions to the secured Billing content.
- **CER Fixed Assets – CER__FA_SECURE**: This is an object security group used to grant permissions to the new Fixed Assets content.
- **CER Human Resources – CER__HR_SECURE**: This is an object security group used to grant permissions to the secured HR content.
- **CER Payroll Secure – CER__PR_SECURE**: This is an object security group used to grant permissions to the secured Payroll content.
- **CER Role Security Group – CER__ROLE_SEC**: Individuals assigned to this user group will only see data of projects where they have an assigned role.
- **CER Development – CER__DEVELOPMENT**: This is an object security group, and users assigned to this group can create managed content in the company content area.

Project Work Force Report

Project Managers can now see a listing of all employees, vendors, or vendor employees and their Project Labor Category (PLC) on a given project through the Project Work Force report. This report is now available in the **Projects** package.

Work Hours by Day by Project or by Resource

You can now see the breakdown of the work hours charged by day, by project, or by resource on a particular Time & Expense project wherein you have a functional role. The report is available in the Time package in **Team Content**.

Project Progress by Role

As a project manager, you can see a summary of the projects that you work on through the Project Progress by Role report, which is available when you open Business Intelligence. Some of the information included with their corresponding drill-through reports are:

- Unbilled Analysis
- Accounts Receivable
- Backlog
- Invoice for Approval
- Open Billing

Menu

Use the new Menu tab to see a list of the reports and dashboards that are available to you. The items are sorted by area, based on how they are defined on the Manage BI Content Menu (BIMENUCON) in Costpoint. To open any item from the Menu tab, click that item.

Updates to Costpoint BI Packages and Content

Several changes to Costpoint BI packages and content are included in this release.

Enhancements in Costpoint BI Accounts Payable

Several changes were made to Costpoint BI Accounts Payable.

Repointed Reports in Accounts Payable

Several reports were modified to use the Accounts Payable package.

- Vendor Master
- Vendor Employee

Enhancements to Costpoint BI Accounts Receivable

Several changes were made to Costpoint BI in relation to Accounts Receivable.

Check Number in the Accounts Receivable Model

The Accounts Receivable (AR) model supports the increased field length of the **Check No.** field.

The **Check No**. field has been changed from a 10-digit integer to a 25-digit varchar field.

Cash Receipts Table

The Cash Receipts table has been updated with the inclusion of a new **Notes** field.

The **Check No.** field has also been changed from a 10-digit integer to a 25-digit varchar field. The following columns were updated:

- CASH_RECPT_TRN
- AR_DETL_HS
- CASH_RECPT_TRN_HS

Repointed Report in Accounts Receivable

The Customer Master Information report now uses the Accounts Receivable package.

Enhancements in Costpoint BI General Ledger

Several changes were made to Costpoint BI in relation to General Ledger.

General Ledger Detail Report

The General Ledger Detail Report was enhanced with the changes to the prompt page and the addition of several columns on the report.

The new columns are:

- Project Name
- ID Type
- Check No
- Posting Sequence No
- Time Stamp
- Cash Receipt No
- Cash Receipt Date

You also have the option to display the Amount, Transaction Amount, or both on the report. If the Transaction Amount is included, the Transaction Currency is included as well. The report can now also be printed in landscape format. To support this enhancement, changes to the General Ledger model were made.

Repointed Reports in General Ledger

The following reports were modified to use the General Ledger package.

- Balance Sheet
- Income Statement
- Account List
- Cash Flow Report
- Organization List
- Reorganization Structure

Enhancements in Costpoint BI Planning

Several changes were made to the Planning area of Costpoint BI.

- **Enhanced Revenue Forecast Report**: The new Revenue Forecast report now displays 12 months of forecast data.

- **Enhanced Project Labor Hours Status Report**: The Project Labor Hours Status report now includes an **ITD Burn Rate** column, which is computed as the actual number of hours worked divided by the number of periods. This information is displayed per resource.
- **New Description Columns for Reporting Tables**: A description column was added to the non-labor budget entry rows of the reporting tables used in Planning. This will help report users identify for what a particular budget entry was used.
- **Planning Model**: When you use Planning models on your reports or dashboards and apply labor suppression, summary values of labor amount values will display.

Enhancements in Costpoint BI Materials

Several changes were made to Costpoint BI in relation to Costpoint Materials.

- In order to support the Customer Return Material Authorization feature, new data fields were added in the Materials Model.
- The Buyer Name filters are now available on the Procurement Dashboards in order to filter the purchase orders and requisitions by buyer.

Enhancements in Costpoint BI CRM & Contracts

Several changes were made to Costpoint BI in relation to CRM & Contracts.

- Opportunity Dashboard
  - **Leads by Source and Opportunities by Source dashparts**: These are now available on the Opportunity Dashboard. These dashparts display where the best leads and opportunities are generated.
  - **Opportunity by Agency/Customer**: This information displays the opportunity value by agency to identify where to focus most of the efforts.
  - **Opportunity by Role**: This information displays the opportunity value for a specific role to see who is bringing in the highest values.
- New fields on the Contract Management Model
- New fields on the lead contact record
  - **Address**: This field enables you to create queries for leads for a particular city or state.
  - **Do Not Contact/Email flag**: This flag helps you to identify leads who do not wish to be contacted further.
  - **Insert button**: This button automatically adds contact information from the Leads header to the Business Affiliations subtask for an existing vendor or customer.
- UDEFs in Contracts

Enhancements in Costpoint BI Employee

The Employee Basic Information report is now available in the Employee folder of Costpoint BI.

The report now uses the secured Employee package.

Enhancements in Costpoint BI Expense

New columns and tables were added in the Costpoint BI Expense model to store Level III Credit Card and ICR tables.

Enhancements to Costpoint BI Projects

Several changes were made to the Costpoint BI in relation to Projects.

Project Revenue Summary Report

A new version of the Project Revenue Summary Report is now available.

The report uses the Projects package, which supports row-level security. New columns were added in the Projects package, such as Period Prior Year Revenue Recognized, with the option to display Target rates, Actual rates, or both.

Project Status Report in Costpoint BI

You can now select an alternate project when you generate the Project Status Report (PSR) in Costpoint BI.

In addition, the header of this report was modified to include the contract and funded values (without future mods). The PSR, including its drill-through links, also use the secured Projects Master package.

Enable Project Role Security Flag in Manage BI Settings

You can now enable Project Role Security in Costpoint BI through the **Use Project Roles Security** drop-down list.

Repointed Reports in the Projects Package

The following reports were modified to use the secured Projects package for better performance.

- Project Master
- PLC Exception Report

Report Repoints

With the enhancement of using Dynamic Query Mode (DQM) on several packages, some of the existing reports were repointed and now use these new packages.

Package	Report
Human Resources	VETS 4212 Report
	EE01 Report
	Employee Benefits Profile
	Benefit Enrollment Report
Payroll	Earnings Report
Billing	Aged Open Billing Detail
	Milestone Invoice
	Pre-Bill Report

Package	Report
	Standard Invoice Backup
	Zero Rate Billing Exception Report
Fixed Assets	Fixed Assets Report
Accounts Payable	Vendor Master
	Vendor Employee
Accounts Receivable	Customer Master Information
General Ledger	Balance Sheet
	Income Statement
	Account List
	Cash Flow Report
	Organization List
	Reorganization Structure
Employee	Employee Basic Information
Projects	Project Revenue Summary
	Project Master
	PLC Exception Report

Admin

This section describes Costpoint 8.2 enhancements for the Admin domain.

Certification Authentication for Web Services

The new Web Services tab in Manage Users (SYMUSR) offers an alternative authentication model to use for web services. On the Web Services tab, set up JWT authentication for users as an additional layer of security. Select the **Authenticate with JWT** checkbox and add the JWT certificate for authentication.

Also, the **Allow Application Access via Integration Services** checkbox from the Authentication tab was moved to the Web Services tab and renamed to the **Allow Application Access via Web Services** checkbox.

Enhanced Authentication for SharePoint Online

Costpoint has a new authentication method for SharePoint Online (O365). You can authenticate Costpoint to SharePoint Online with application (app-only) authentication in Azure Active Directory.

In the Costpoint Configuration Utility, this feature is supported with the new Security Mode option, **Federated (OAUTH2)**. This option is available when the API Type is **SharePoint Web Services.** More information is available in the Deltek Costpoint 8.2 Configuration Utility Technical Guide.

Enhanced User Experience for Biometric Authentication

Costpoint's enhanced user interface simplifies the login experience.

- The **Password** field no longer displays on the Costpoint Login screen by default. Only if you are set up for password-based authentication, for example, Database or AD, will the **Password** field display on the Costpoint login page. For all other authentication methods, such as SAML, Kerberos, FIDO, or Cert-based SSO, the **Password** field will not be accessible.
- Support has been added for FIDO Passkeys on Apple, Android, and Windows devices.
- A new biometric authentication fingerprint icon on the Costpoint Login screen makes users aware of FIDO/Passkey/Biometric password-less authentication.
- Users are prompted to choose a login method when they access Costpoint for the first time.
- For users using Database or Deltek Cloud AD authentication, a new prompt is displayed to switch to a more secure password-less authentication (if the device supports it). Depending on your computer or phone configuration, you can log in with your Face ID, fingerprint, or PIN (Windows Hello should be enabled on Windows computer) or use your iPhone or Android phone to log on to your laptop. You can decline and not see the prompt going forward or ask to be reminded later.
- Costpoint includes the option to try another authentication method to log in if you have multiple methods set up. For example, the Logout screen will provide an option to use another authentication method via the **Try another way to sign in** link. This link is also available within the Login Error dialog box, which displays if a user enters invalid credentials. The **Password** field is dynamically shown/hidden on the Login screen based on the login option selected. The selected login option will be remembered and offered to a user by default on subsequent logins.
- New fields were added to the Biometric Devices subtask in Configure User Preferences.
  - **Device Type**: This field shows the kind of device or credential registered as Platform or Cross-platform.

- **Multi-device**: This field shows whether a biometric credential, such as a fingerprint or face recognition, can be used to log in to Costpoint on multiple devices.

Support for Multiple SAML Providers

The option to add multiple SAML providers to Costpoint is now available in the Product Configuration Utility. This security enhancement is helpful when you have multiple SAML providers for different user bases, such as post-acquisition or third-party solutions support.

Use the new **SAML Provider ID** field in the Manage Users application to assign a SAML IdP to a user. The IdPs available in Lookup are based on the SAML IdPs set up in the Product Configuration Utility. **This field is enabled only for SAML-type authentication methods.**

Costpoint Light/Dark Mode

The new Color Theme setting, located on the Screen Configuration Panel on the Global Toolbar, lets you change the background color in Costpoint from the standard lighter background (Light Mode) to a darker background (Dark Mode), reducing the light emitted from the screen, which can be beneficial in dim light situations and reduce eye strain. The Color Theme setting includes the following options:

- **Light**: This option displays Costpoint screens with dark text on a light background.
- **Auto:** This option displays the color theme your browser uses. For example, if your computer or mobile device uses a dark mode setting, Costpoint will display in Dark mode.
- **Dark:** This option displays Costpoint screens with light text on a dark background.

Navigation Changes

The user interface was updated to support easier navigation.

Menu Navigation

New menu navigation improves the way users move throughout Costpoint by providing an intuitive experience that enhances existing functionality.

Improved Handling of Multi-Domain Applications in Application Menu

When an application shares multiple modules across different domains, such as how AP, PO, and PP modules share the APMVEND application, the Browse Applications menu shows the application only in

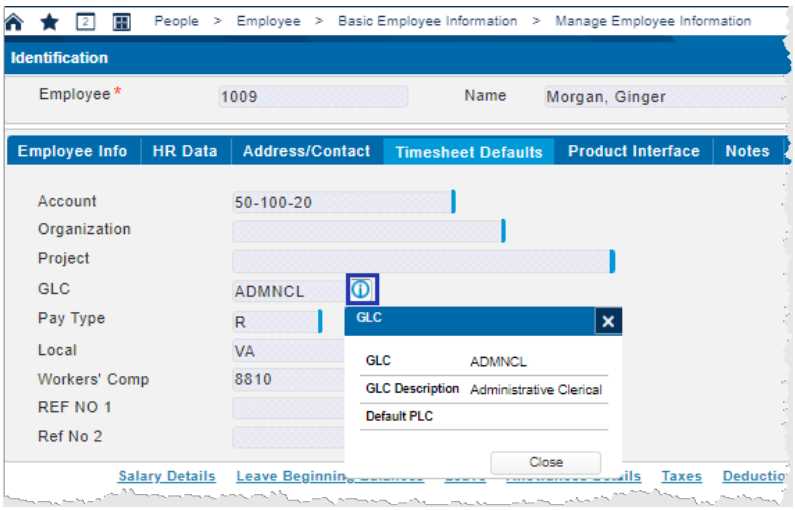
the domain where the user has module rights. Previously, you could see multiple domains for the same application in the Browse Applications menu.

Info Card for Fields

Quickly view a non-editable Info Card that contains additional details about the value in a field. This feature helps you understand what you are viewing without having to leave the current screen.

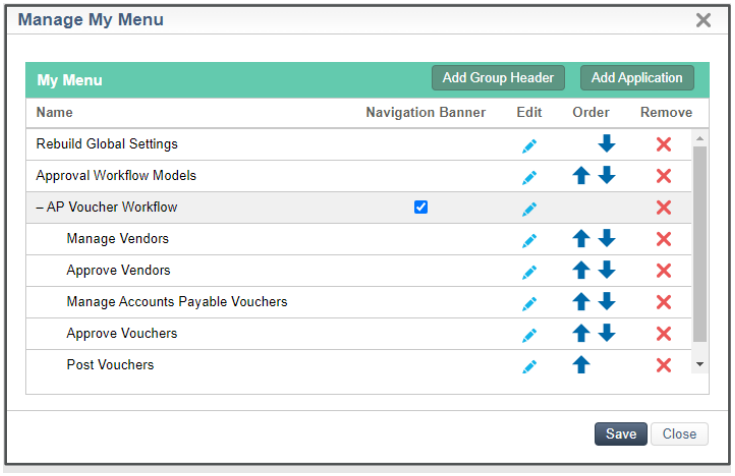
For non-editable fields, click the icon in the data field to open the info card. When typing ahead in an editable field, the **Info Card** icon displays next to the values in the drop-down list. Click the icon to view the Info Card, and click **Select** in the Info Card to add the value to the field.

This feature is available in Form View and Table View.



Simplified Setup for My Menu and Navigation Banners

Easily add applications to My Menu without opening the Configure User Preferences application. Use the new **Manage My Menu** window to add applications to My Menu and create navigation banners.

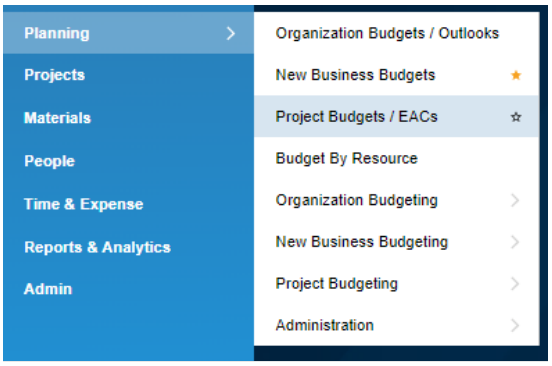


Access the **Manage My Menu** window from My Menu in the following locations:

- On the Left Navigation Menu, expand **My Menu** and click **Manage My Menu**.

- On the Navigation Toolbar, click and then click **Manage My Menu** at the bottom of the window.
- On the Welcome screen, click **Manage My Menu** beside the **My Menu** title.

To quickly add an application to My Menu, expand the General Menu or Open Applications on the Left Navigation menu and click the hollow star next to an application. To add that application to a navigation banner, open Manage My Menu and add the application to a Group Header and select the Navigation Banner checkbox for the group.

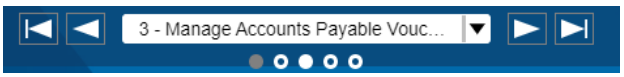


New Navigation Banner Style and Functionality

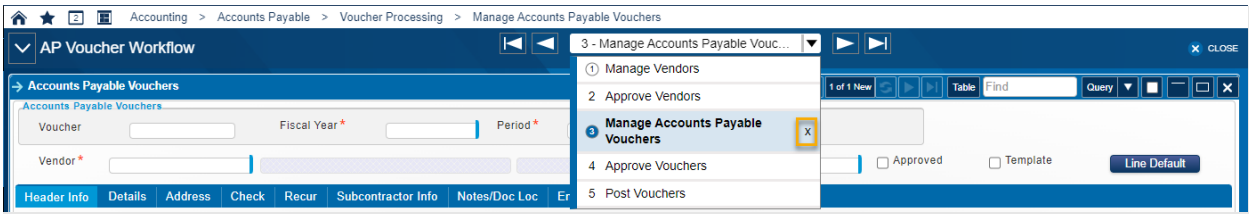
Display a collapsed view of your navigation banners to maximize space in your Costpoint window. The previous expanded view of the navigation banner, where the applications display across the top of your application screen, is still available. Click to collapse or expand the navigation banner. In addition, you can now close all applications in the navigation banner by clicking **Close** at the right side of the banner.

Collapsed Banner

When the navigation banner is collapsed, use the application list to navigate between application screens. The new gray shaded circle indicators show which applications are open, and the highlighted circle indicates the currently displayed application.

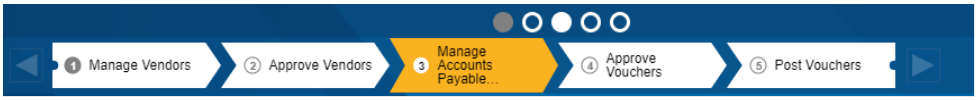


The application indicators also show in the collapsed banner's application list. To close an application quickly, click the **X** next to the application name.



Expanded Banner

The application indicators also show in the expanded view.



Manage Application/Content Links (SYMCMIAL) Application Updates

To support the new Accounting domain feature, Intelligent Character Recognition (ICR) was added to allow users to scan invoices and automatically populate the Accounts Payable vouchers with the invoice details. This feature minimizes the need for manual data entry of the invoice into Costpoint. This feature will utilize Content Management Integration (CMI) as part of the import/scan process.

To support ICR capability, enhancements were made to the CMI process. The Manage Application/Content Links screen was updated with a new **Show Scan action button** checkbox. Select this checkbox for an application/result set to display the **Attach & Scan** option in the new Attach dialog box and the **Scan** option in the Linked Content Files subtask when a user attaches a file to a record. This checkbox will be available only for applications set up for ICR.

A new dialog box has been added to improve the CMI process and reduce the number of steps it takes to attach a document to a Costpoint record. All screens that have CMI applied will now have two options available from the **Attach** button. **Attach** will display a new Choose File dialog box and a **View Linked Content Files** option. The **Linked Content Files** option will open the existing subtasks, and users can process their documents using existing processes.

The new Choose File dialog box eliminates the need to use the **Process » File Upload** application and consolidates attaching a file into one screen, reducing the number of steps it takes to attach a document to a record.

Assign a Default Content Type

On the Manage Application/Content Links screen, select the **Default Content Type** checkbox to set the selected content type as default for that specific application/result set. You can assign one default content type per result set. This new functionality is not limited to users who need ICR functionality.

Default Source

To reduce repetitive selections when linking content files, you can set the default source location for content files for an application/result set in the Default Source section. Select **Local File** when most files for the application/result set need to be uploaded to the source storage location. Select **Alternate File Location** when most files are already uploaded to the source storage location. This new functionality is not limited to users who need ICR functionality.

New Behavior for Content Link Setting

On the Manage Application/Content Links screen, when the **Allow New Content Links in this Application/Result Set** checkbox is not selected, you will not see the content type in the **Attach** feature or in the **Content Type** list on the Linked Content Files subtask.

SMB License Indicator

The View Help About screen has been updated with an **SMB License** flag that indicates whether the essential Costpoint license is applied to the client database.

Query Feature in Applications with Tabbed Subtasks

The **Query** button is available at the parent level of the result set when you open subtasks that are displayed as tabs in applications in the CRM & Contracts domain. This enhancement allows you to query results for fields within these subtasks across all records. The following applications have been updated:

- Manage Contracts
- Manage Opportunities
- Manage Subcontracts
- Manage Contract Management Vendor Info
- Manage Contract Management Customer Info

Auto-Positioning Setting On by Default

Auto positioning, which currently exists in Costpoint, automatically increases the font on large monitors if there is enough space. It also lays the elements on the screen using the best use of space, creating a better user experience. The Auto Positioning On setting is now on by default but can be turned off. Administrators can set the defaults at the company level on the Configure Systems Settings screen or for specific users in Manager Users. Users can modify their default preference in Configure User Preferences.

Support for Latest WebLogic Version

Costpoint 8.2 supports the latest version of WebLogic and Java 11.

SQL Partitioning

Costpoint supports SQL partitioning for SQL Server to improve performance. This feature is optional and requires the deployment of extra scripts to partition the tables.

Oracle Partitioning

Costpoint supports partitioning for Oracle databases to improve performance. This feature is optional and requires the deployment of extra scripts to partition the tables.

Manage Message Boards Retired

The Message Boards feature has been retired. This update includes the removal of the Manage Message Boards (SYMBOARD) application and the Message Board Subscription subtask in Configure User Preferences.

Also, the MS Exchange Server Connection settings on the MS Exchange and Skype tab in the Product Configuration Utility has been removed, and the MS Exchange and Skype tab is now called MS Skype.

Improve Manage System Integration Accounts for GovWin IQ Interface

The Manage System Integration Accounts screen features improvements to help facilitate integration issues between GovWin IQ and Costpoint. The following are the updates to the screen:

- The GovWin IQ subtask now provides **Client ID** and **Client Secret** fields, which allow you to update/maintain this information directly in Costpoint in addition to the Product Configuration Utility. You will still need to initialize the integration using the Product Configuration Utility.
- A **Test Connection** button allows you to ensure that the setup is working correctly with the GovWin IQ system.
- The General Information Tab now indicates the following: note “Some of the changes will only take effect after running Rebuild Global Settings.”
- The following tabs for unsupported integrations have been removed:
  - GovWin CM Integration
  - Resource Planning Integration

Transfer of Cobra Application and Removal of GovWin Capture Management Interface Applications

Cobra Interface Applications Moved to the Projects Domain

Previously located under the System Administration module in the Admin domain, the following applications are now available in the Cost and Revenue Processing module in the Projects domain (**Projects » Cost and Revenue Processing » Cost and Revenue Processing Interfaces**):

- Configure Cobra Interface Settings (AOMCBSET)
- Manage Cobra Charge Templates (AOMCBCHG)
- Manage Cobra Resource Templates (AOMCBBET)
- Manage Cobra Cost Templates (AOMCBCST)
- Manage Cobra Project Mapping (AOMCBPRJ)
- Manage Cobra Extraction Parameters (AOMCBEXT)
- Compute Cobra Burden Costs (AOPCBLAB): This is also still accessible via **Projects » Cost and Revenue Processing » Project Cost Processing**.
- Manage Prior Year Cobra Costs (AOMCBPYC): This is also still accessible via **Projects » Project Setup » Project History**.

Removal of GovWin Capture Management Interface Applications

GovWin Capture Management/Contract Management moved into sustaining support on August 1, 2020. As such, the Costpoint integration with GovWin Capture Management is no longer supported. The following applications have been removed from the Costpoint menu:

- Transfer GovWin Capture Management Data (AOPCMDAT)
- Migrate GovWin Capture Management Data (AOPCPDAT)
- Configure Customer Options (AOMVSCU)
- Configure Employee Options (AOMVSEM)
- Configure Organization Options (AOMVSOR)
- Configure Project Options (AOMVSPJ)
- Configure Vendor Options (AOMVSVN)

- Manage Project Level Mapping (AOMVSPJM)
- Manage Interface Configuration and Scheduler (AOMAIICS)
- Activate Instance Control (AOPAIAIC)
- Manage Interface Elements (AOMAIELM)
- Manage Element Value Mappings (AOMAIEVM)

Improved Access to Progressive Web App (PWA) Functionality

Web users can save Costpoint as a native windows application and benefit from easy access and full-screen real estate. Mobile users can have a native mobile app experience adapted for smaller screens. To improve awareness of this feature, when you log in to Costpoint, you are prompted with the following options for Costpoint PWA:

- **Learn More and Register:** See information about FIDO and choose whether to install Costpoint as a PWA on your device.
- **Remind Me Later:** Costpoint will remind you in one week.
- **No Thanks:** Costpoint will not prompt you again until you clear the browser cookies.

New Query Filter Option

Use the three new filter options on the Query tab in the Query window to show only the application data that do not start with, end with, or is not like the value stated in the query.

- not begins with (not like%)
- not ends with (not %like)
- not like (%like%)

New Default View for Manage Job Queues

The Manage Job Queues (PMMQUE) screen has a new default view that applies the **not begins with** query to hide the system ($) queues from your job queue list. To display the system job queues, remove the condition on the Query tab in the Query window.

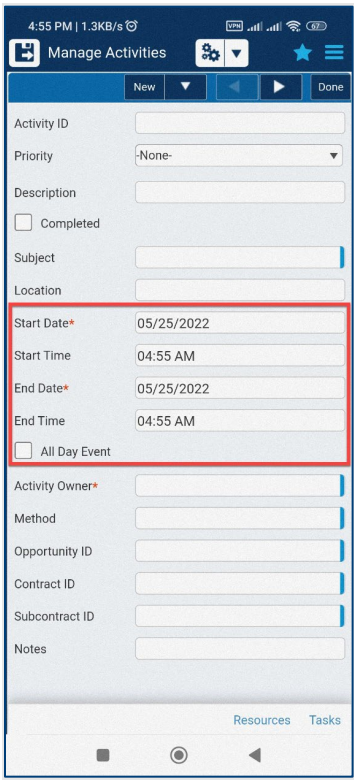
Costpoint Mobile/PWA

This section describes 8.2 enhancements for Costpoint Mobile/PWA.

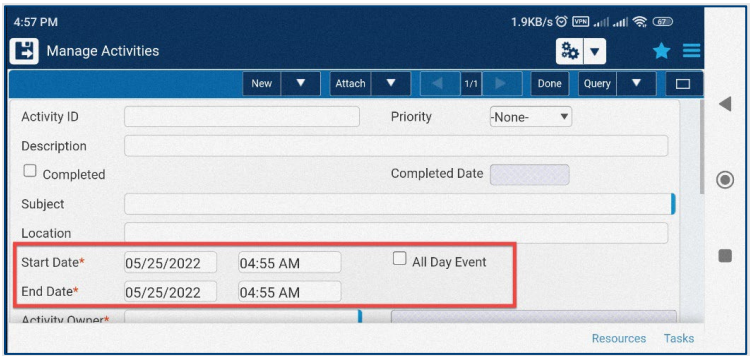
Activities Enhancements: Mobile Updates

Updates made to the Manage Activities screen in the native Costpoint application are also implemented in Costpoint Mobile. The same functionalities work, but there are slight differences in the layout and labels to make it easier for you to enter date and time values.

In portrait mode, the new fields are labeled as **Start Date**, **Start Time**, **End Date**, and **End Time**.



In landscape mode, the new fields are labeled as **Start Date** and **End Date**.



Attention: Refer to New Fields and Updates to the Calendar File for more information on the enhancements made to the Manage Activities application.

Install Costpoint PWA Tooltip

When you open the Costpoint Login page on an iOS device, a new tooltip displays instructions to install the Costpoint PWA.

Push Notification Updates

Costpoint PWA includes more support for push notifications:

- Push notifications are now supported on iPhones and iPads.
- Notification badges are now supported on Android devices, iPhones, and iPads.

Note: Push notifications are not available on the native Time & Expense app on either Android or iPhone.

Platform Changes

See the Compatibility Matrix for the latest platform versions and key technologies supported by this Costpoint release.

Information that can be obtained from the matrix includes the following:

- Server Software Requirements
- Additional (Optional) Server Software Requirements
- Client Software Requirements
- Deltek Product Integration

Access the Compatibility Matrix through the Deltek Support Center:

KB Article 38499

Installation Instructions

For on-premises customers, refer to the installation guides available in Deltek Software Manager (DSM).

De-supported Applications

The following applications have been de-supported in Costpoint 8.2.

Domain	Module	Application ID	Application Name
CRM & Contracts	Opportunities	CTMOPPM	Opportunities Quick View
Admin	System Administration	SYMBOARD	Manage Message Boards
Admin	System Administration	AOPCMDAT	Transfer GovWin Capture Management Data
Admin	System Administration	AOPCPDAT	Migrate GovWin Capture Management Data
Admin	System Administration	AOMVSCU	Configure Customer Options
Admin	System Administration	AOMVSEM	Configure Employee Options
Admin	System Administration	AOMVSOR	Configure Organization Options
Admin	System Administration	AOMVSPJ	Configure Project Options
Admin	System Administration	AOMVSVN	Configure Vendor Options
Admin	System Administration	AOMVSPJM	Manage Project Level Mapping
Admin	System Administration	AOMAIICS	Manage Interface Configuration and Scheduler
Admin	System Administration	AOPAIAIC	Activate Instance Control
Admin	System Administration	AOMAIELM	Manage Interface Elements
Admin	System Administration	AOMAIEVM	Manage Element Value Mappings

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support website for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the website.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

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

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com