# Deltek Costpoint® 7.1.1

Cumulative Release Notes for July 2018

**July 31, 2018**

# Contents

# Overview

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

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

Costpoint 7.1.1 Online Help

# Platform Changes

## Costpoint 7.1.1 SQL Server 2017 Compatibility

Costpoint 7.1.1 is updated to support SQL Server 2017.

### System Requirements

This enhancement requires the following:

- DeltekCostpoint711ApplicationTier_Build05.1.exe
- DeltekCostpoint711Collation_Build05.1.exe
- DeltekCostpoint711DatabaseTier_Build05.1.exe
- DeltekCostpoint711WebTier_Build05.1.exe

## New Costpoint 7.1.1 User Interface

Costpoint 7.1.1 has a new modern and intuitive user interface (UI) with many enhancements.
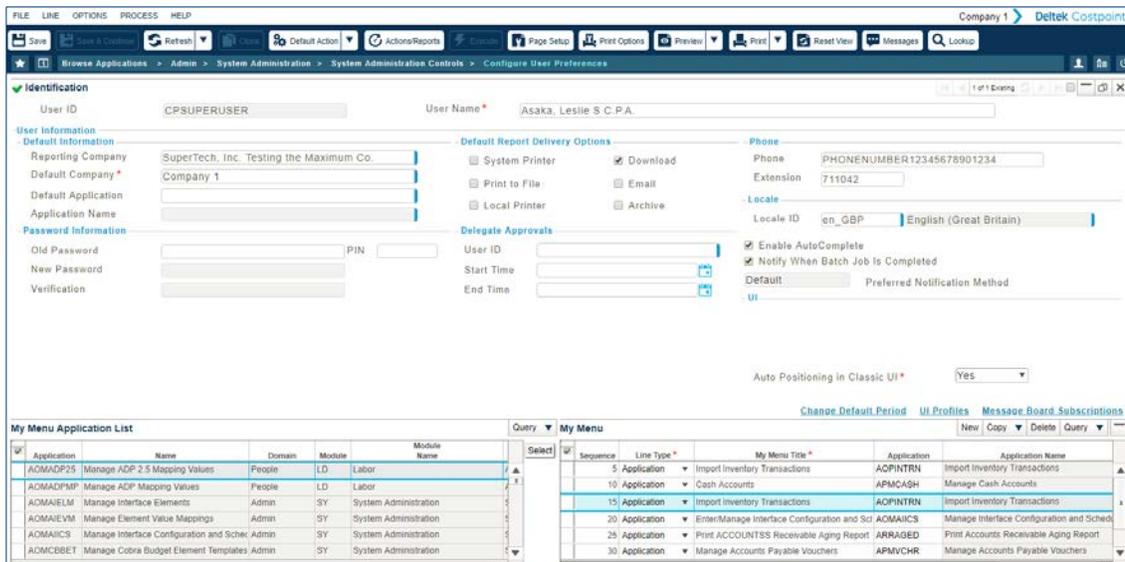


## Changes to the Desktop

### Improved User Interface and Navigation

The new UI streamlines navigation and provides an improved user experience. Some of the updates include:

- A new Login screen with the option to use the new UI or the classic view.
- A responsive layout and optimized screen size.
- Modernized menus, toolbars, and icons.
- Redesigned lookup, query, messages, and dialog windows.

For more information:

- View a Walkthrough of Costpoint's new UI.
- Learn how to navigate the new UI in the Costpoint Navigation video.

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- Refer to the Getting Started Guide for detailed descriptions of updated icons, dialogs, menus, and toolbars.
- Refer to the Deltek Costpoint 7.1.1 New UI FAQs for common questions about the new UI.
- Read Knowledgebase article #94430 to learn about the upcoming updates for Time and Expense 10.

The quick reference cards or QRCs found in the online help have also been updated to align with the new user interface.

- Query and Lookup QRC
- Setting Up Printers QRC
- Shortcut Keys, Toolbar Icons, and Buttons QRC
- Views QRC

The User Interface click-thru is also available to give you more information about the new Costpoint user interface.

## Changes to the Mobile View

The new UI is also available in the Costpoint mobile view.
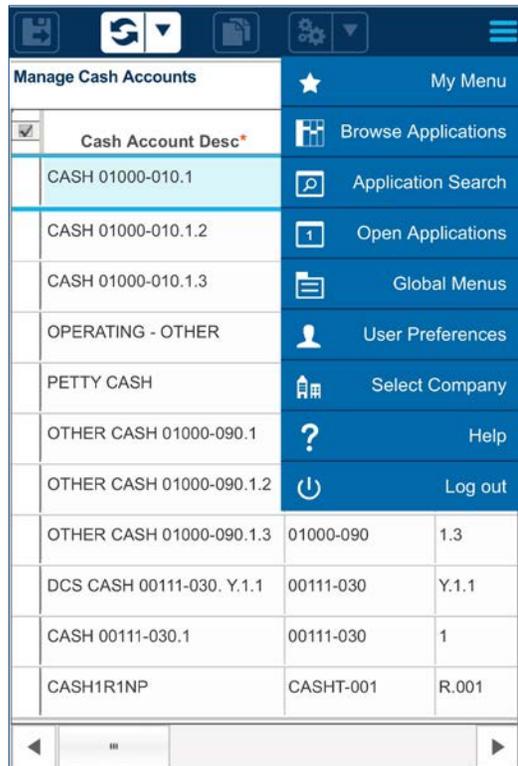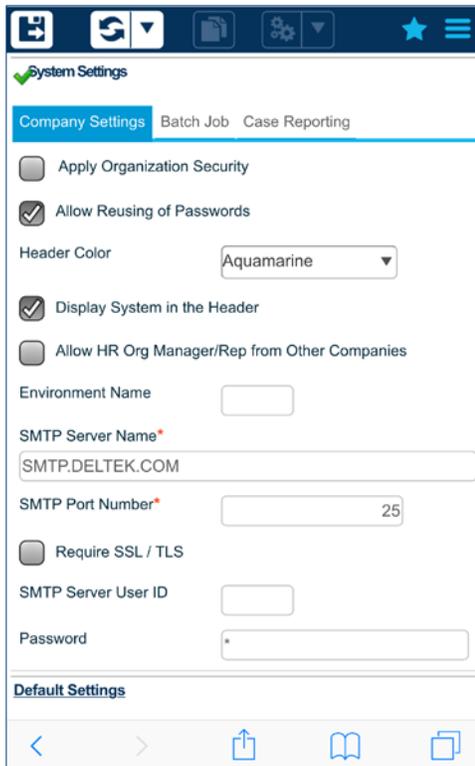


## System Requirements

This enhancement requires the following:

- cp711_sys_043.zip

# Installation Instructions

## Custom Programs Affected

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Support Center at https://deltek.custhelp.com before you install the update.

## To Download the HotFix/Feature Update:

1. From Internet Explorer, go to https://dsm.deltek.com.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Support Center credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

## To Install the HotFix/Feature Update:

Refer to the installation instructions posted on Deltek's Support Center site, https://deltek.custhelp.com.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.
- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.
- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

## To Check to See if the HotFix is Installed:

1. Open the application that was updated.
2. Click **Help** > **About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

## To Check to See if the Feature is Installed:

1. Click **Help** > **About Costpoint** from the Costpoint toolbar.
2. Open the Features subtask and click the Feature that was just installed.
3. Open the Applications subtask. Check the list of applications and their corresponding application jars and see if they are correct and have been successfully deployed (highlighted in green).
4. Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

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

# More Information:

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

# Costpoint

## Accounting

There are no changes to the Accounting domain for this release.

## Contracts

### Patch 3466

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

### Patch 3467

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

### Contract Management Video and Click-Thrus

The Contract Management Overview video has been updated to reflect the new UI and the change from the Contract Management module to the new Contracts domain. See the latest video through this link: Contract Management Overview.

Click-thrus have also been created to give you an overview about the main areas in the Contracts domain and assist you as you work with these areas. Use the following links to access the click-thrus:

- Opportunities Overview Click-Thru
- Organizational Conflict of Interest Overview Click-Thru
- GovWin IQ Integration Overview Click-Thru
- Contracts Overview Click-Thru
- Subcontracts Overview Click-Thru
- Customer, Vendor, and Employee Overview Click-Thru

## Projects

There are no changes to the Projects domain for this release.

## People

### Allow Updating of Organization IDs on Job Templates

This Costpoint release will allow you to modify the Organization IDs on existing job templates. In order to implement the enhancement, the Organization ID will no longer be the primary key of job templates.

#### Screen Updates

The release updates the following screens for this enhancement:

**Approve Position Requisitions (HPMAREQ)**

- The organization ID was removed from the primary key of job templates.
- A new Original ID field displays the original job template ID. This field will only be populated if there was previously another record in the table with the same ID.

- When you use the Query function, the Find and Query tab now allows you to search for job templates using the Original ID field.

### Configure Personnel Settings (HPMSET)

A new **Require Org ID** check box allows Deltek Talent Management users to either require or not require the Organization ID on the job templates for a company.

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**Note:** This check box is enabled only when you have a Deltek Talent Management license. If you opted to clear the Require Org ID check box, and then you stopped using Deltek Talent Management, you must manually select this check box to require organization IDs on job templates.

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## Manage Employee Information (LDMEINFO)

When creating employees through SilkRoad or Talent Management, and when searching for a job template, the application uses the original ID for the job template as the job template ID. If the original ID does not exist, the application uses the job template ID.

## Manage Job Templates (HPMREQR)

The following are updates to the Manage Job Templates screen:

- The organization ID was removed from the primary key of job templates.

- The **Organization ID** field can now be edited.

- A new **Original ID** field displays the original job template ID. This field will only be populated if there was previously another record in the table with the same ID.

  The company ID is now part of the primary key of job templates. Previously, the application performs a validation to ensure that each job template ID was unique to a company ID.

## Setup Company (SYPCOMP)

When you create a new company, the application applies a default value of **Y** to new **Require Org ID** field on the Configure Personal Settings application (HP_PER_ADM_SETTINGS.ORG_REQ_FL).

## Transfer SilkRoad Data (LDPSRDAT)

When searching for an existing job template ID (H_POS_RQ_RQST.RQ_NO), the application determines if it exists for the employee's company. If not, the application searches the **Original ID** field (H_POS_RQ_RQST.ORIG_RQ_NO).

When transferring the job template information to SilkRoad, if data exists in the **Original ID** field, the application sends that ID number instead of the job template ID.

## Transfer Talent Management Data (EMPHRSDAT)

When searching for an existing job template ID (H_POS_RQ_RQST.RQ_NO), the application determines if it exists for the employee's company. If not, the application searches the **Original ID** field (H_POS_RQ_RQST.ORIG_RQ_NO).

When transferring the job template information to Deltek Talent Management, if data exists in the Original ID field, the application sends that ID number instead of the job template ID.

## Known Issue

### Newly Created Company Inherits the Auto-Approve Position Requisition Value of Login Company

**Deltek Defect Tracking Number: 967206**

**Description:** When you log in to Costpoint using a company with a default approver on the Configure Personnel Settings screen (the **Auto-Approve Position Requisitions** check box was selected and a valid **Default Requisition**

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**Approver** was specified), and then you create a new company, the created company inherits the login company's **Auto-Approve Position Requisitions** (REQ_AUTO_APPRVL_FL) column value in the H_PER_ADM_SETTINGS table.

**Customers Impacted:** This defect affects Costpoint Personnel users.

**Workaround Before Fix:** Set up an approver on the Manage Position Requisition Approvers screen, and then use the approver on the Configure Personnel Settings screen.

**Additional Notes:** None.

## System Requirements

This enhancement requires the following Costpoint 7.1.1 releases:

- PATCH3381
- Common Lib - LDMEINFOLIB (cp711_cmnlib_LDMEINFOLIB_006.zip)

## Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

| Domain | Module | Application ID | Application Name | Application File |
|---|---|---|---|---|
| Administration | System Administration | SYPCOMP | Setup Company | cp711_sypcomp_021.zip |
| People | Employee | EMPHRSDAT | Transfer Talent Management Data | cp711_emphrsdat_015.zip |
| People | Employee | HPMREQR | Manage Job Templates | cp711_hpmreqr_012.zip |
| People | Employee | LDMEINFO | Manage Employee Info | cp711_ldmeinfo_022.zip |
| People | Employee | LDPSRDAT | Transfer SilkRoad Data | cp711_ldpsrdat_011.zip |
| People | Personnel | HPMAREQ | Approve Position Requisitions | cp711_hpmareq_003.zip |
| People | Personnel | HPMSET | Configure Personnel Settings | cp711_hpmset_003.zip |

# Regulatory and Compliance

## IMPORTANT NOTES

Warning: Unless specifically noted in the release notes, any future federal and state tax table changes (not just Colorado) will require the following:

System JAR 054 for Costpoint version 7.0.1

System JAR 028 for Costpoint version 7.1.1

### Versions 7.0.1 and 7.1.1 - Calendar Year End 2018

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

**Anticipated Calendar Year End 2018 System JAR Requirements**

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

**Notes:**

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

**System JAR 049 for Costpoint 7.0.1** and **System JAR 028 for Costpoint 7.1.1** introduced a much needed change to the State Filing Statuses in Costpoint. Rather than using filing statuses that only applied to Costpoint (Both, Miscellaneous 1, Miscellaneous 2, etc.) and had to be manually mapped to each state's actual filing statuses, Costpoint 7.0.1 and 7.1.1 have been updated to use each state's actual filing status(es). Though the new filing statuses were introduced in April 2017, Deltek will continue to support tax table updates based on the original state filing statuses for the remaining 2018 tax updates. Any tax updates for 2019 will only support the new state filing statuses that were introduced in System JAR 049 for 7.0.1 and System JAR 028 for 7.1.1 (both released in April 2017).

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

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

The changes we made with the noted System JARs will greatly help with that effort to minimize the System JAR requirements for future regulatory releases.

## 2018 New Mexico Withholding Tax

This release updates Costpoint to support the following changes to the New Mexico withholding tax:

- The State's tax brackets were updated.
- The amount per allowance increases from $4,050 to **$4,150**.
- When calculating New Mexico state tax withholding for an employee, if that employee claims more than three allowances on his/her W-4, only three of the allowances will be applied.

Note: In order to apply this change, New Mexico exemption amounts were moved from the Manage State Taxes screen to the Manage State Tax Withholding Adjustments screen where the transferred exemptions have an exemption type of **Personal Exemption Allowances** in the **Type** field.

## System Requirements

**Warning:** You must install the following before installing PATCH3486:

**System JAR 028**

**PATCH3374** — New York, Ohio and Wyoming SUTA Wage Base

**PATCH3385** — Virgin Island SUTA Wage Base/Oregon and Virgin Island State Tax

**PATCH3396** — Add State Filing Status of Exempt

**PATCH3401** — Louisiana Withholding Tax

**PATCH3459** — Utah and Idaho State Tax

**PATCH3465** — Colorado State Tax

If you attempt to install patches 3374, 3385, 3396, 3401, 3459, and 3471 after installing the May 2018 Colorado tax table update (**PATCH3465**), the state updates will **not** be properly implemented.

# 2018 Q3 July SUTA Electronic Filing Updates

This Costpoint release includes enhancements to support the 2018 SUTA electronic filing updates of Alaska and Florida.

## Alaska

The State of Alaska updated the Occupational Coding Manual for 2018. This release updates the Costpoint database tables for Alaska Geographic Code (S_AK_GEO_CD) and Alaska Occupational Code (S_AK_OCC_CD) to reflect the 2018 coding changes.

This release also adds new validations on the Create Quarterly SUTA Tax File (PRPSMM) screen to ensure that there are no invalid or missing codes when you create the tax file for Alaska.

## Florida

The Florida Department of Revenue released an updated reemployment tax specification (Schema v2018 1.0) last March 2018. In order for Costpoint to be compliant with Florida's requirement, this release updates the Create Quarterly SUTA Tax File screen to use the latest XML Schema for the State of Florida.

## System Requirements

This enhancement requires Costpoint 7.1.1 PATCH3436.

## Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

| Domain | Module | Application ID | Application Name | Application File |
|--------|--------|----------------|------------------|------------------|
| People | Payroll | PRPSMM | Create Quarterly SUTA Tax File | cp711_prpsmm_022.zip |

# Materials Management

## Organizational Security - Inventory

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Materials domain, specifically in the Inventory module. This feature ensures that correct user access is

applied to the logged-in user ID in accessing inventory transactions by validating and filtering records/transactions as authorized for the user ID.

## Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 043 (cp711_sys_043.zip)
- PATCH5110
- PATCH5121
- PATCH3390
- PATCH3397
- PATCH3405
- PATCH3483

## Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable..

| Domain | Module | Application Name | Application ID | Application Files |
|---|---|---|---|---|
| Materials | IN | Configure Inventory Accounts | INMACCT | cp711_inmacct_003.zip |
| Materials | IN | Configure Default Project Inventory Accounts | INMWACCT | cp711_inmwacct_003.zip |
| Materials | IN | Manage Inventory Projects | INMPROJ | cp711_inmproj_010.zip |
| Materials | IN | Enter Cost Adjustments | INMCSADJ | cp711_inmcsadj_006.zip |
| Materials | IN | Enter Inventory Transfers | INMPAXFR | cp711_inmpaxfr_015.zip |
| Materials | IN | Manage PO/Req Inventory Reservations | INMPORSV | cp711_inmporsv_008.zip |
| Materials | IN | Create Inventory Abbreviations | INPALLOC | cp711_inpalloc_004.zip |
| Materials | IN | Enter Issues to Project/Account/Org or PO | INMPAISS | cp711_inmpaiss_020.zip |
| Materials | IN | Enter Scrap Adjustments | INMSCADJ | cp711_inmscadj_012.zip<br>cp711_cmnlib_INMADJLIB_001 |
| Materials | IN | Enter Quantity Adjustments | INMQTADJ | cp711_inmqtadj_012.zip |

| Domain | Module | Application Name | Application ID | Application Files |
|--------|--------|-----------------|----------------|-------------------|
| | | | | cp711_cmnlib_INMADJLIB_001 |
| Materials | IN | Enter Location Transfers | INMLOXFR | cp711_inmloxfr_010.zip |
| Materials | IN | Create Mass Inventory Transfers | INPMSXFR | cp711_inpmsxfr_010.zip |
| Materials | IN | Manage Inventory Requests | INMRQST | cp711_inmrqst_001.zip<br>cp711_cmnlib_INMRQSTLIB_001 |
| Materials | IN | Manage Inventory Reservations | INMPARSV | cp711_inmparsv_001.zip<br>cp711_cmnlib_INMRQSTLIB_001 |
| Materials | IN | Print Purchase Price Variance Analysis Report | INRPPV | cp711_inrppv_002.zip |
| Materials | IN | Create Purchase Price Variance Journal Entry | INPPPV | cp711_inppppv_002.zip |
| Materials | IN | Print Inventory Reorder Report | INPREORD | cp711_inpreord_014.zip |
| Materials | IN | Print Inventory Transaction History | INRHSTPA | cp711_inrhstpa_004.zip |
| Materials | IN | Load Organization IDs | INPLDORG | cp711_inpldorg_001.zip |
| Materials | IN | View Inventory Transaction History | INQHSTPR | cp711_inqhstpr_007.zip |
| Materials | IN | View Part Inventory | INQPINV | cp711_inqpinv_017.zip |
| Materials | IN | Import Inventory Transactions | AOPINTRN | cp711_aopintrn_005.zip |
| Materials | RC | Enter Miscellaneous Inventory Receipts | RCMMSRC | cp711_rcmmsrc_012.zip |

# Administration Domain

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

## View Help About (SYMABOUT)

The Features subtask on the View Help About (SYMABOUT) screen now includes the Organization Security feature for the Inventory module.

# Materials Domain

This section includes summaries of changes made in relation with the Organization Security feature within the Costpoint Materials domain.

## Configure Inventory Accounts (INMACCT)

Costpoint now narrows the search and displays only organizations authorized for your logged-in user ID. If you enter an organization that you do not have full rights to, Costpoint displays the following error message: Your user ID does not have access to the Organization: [Org ID].

## Configure Default Project Inventory Accounts (INMWACCT)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the project's owning organization.

- Lookup

  - Inventory Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.

  - Project Abbrev — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.

  - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID.

- Data Entry — If organization security is enabled in the system settings, and the screen is activated for organization security, Costpoint will not allow you to enter or select records that your user ID does not have full rights to. Costpoint displays error messages for unauthorized entries.

## Manage Inventory Projects (INMPROJ)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the project's owning organization.

- Lookup

  - Inventory Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.

  - Project Abbrev — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.

  - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID.

- A new field, **Organization**, has been added to the screen to display the owning organization of the inventory project.

- Data Entry — If organization security is enabled in the system settings, and the screen is activated for organization security, Costpoint will not allow you to enter or select records that your user ID does not have full rights to. Costpoint displays error messages for unauthorized entries.

## Enter Scrap Adjustments (INMSCADJ)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights to the adjusting organization on the transaction. When your rights to the adjusting organization have been established, Costpoint displays all other information, regardless of your rights to associated projects and inventory abbreviations.

- Lookup

- Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID. In addition, Costpoint displays only organizations that the material handler and approver are authorized for when you do a lookup of material handler/approver project and organization.

- Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID. In addition, Costpoint displays only projects that the material handler and approver are authorized for when you do a lookup of material handler/approver project and organization.

- Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects authorized for the logged-in user ID. In addition, Costpoint displays only inventory abbreviations that the material handler and approver are authorized for when you do a lookup of material handler/approver project and organization.

- New records — When you enter scrap inventory abbreviation, Costpoint defaults to the material account, material organization, and organization abbreviation in the scrap at the header level. In addition, Costpoint now saves the scrap organizations in the inventory transaction organization ID table.

## Enter Inventory Transfers (INMPAXFR)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the Inventory Abbrev in the To group box of the transaction header. When your rights to the scrap inventory abbreviation's organization have been established, Costpoint displays all transaction lines, regardless of your rights to associated projects and inventory abbreviations.

- Lookup

  - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects authorized for the logged-in user ID. In addition, Costpoint displays only inventory abbreviations with projects and organizations that the material handler is authorized for when you do a lookup of material handler/approver project and organization.

  - Reservation — Costpoint now narrows the search and displays only reservations with organizations from the To group box authorized for the logged-in user ID..

- A new field, **Organization**, has been added to the screen to display the default value from the inventory abbreviation code.

- New records — When you enter the **Inv Abbrev** in the **To** group box, Costpoint defaults to the material organization at the header level. In addition, Costpoint now saves organizations of the **To** group box in the inventory transaction table.

## Manage PO/Req Inventory Reservations (INMPORSV)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights to the buyer's organization associated with the PO or the requisitioner's organization associated with the requisition on the reservation header. When your rights have been established, Costpoint displays all reservation lines, regardless of your rights to associated projects and inventory abbreviations.

- Lookup

  - PO/Rlse — Costpoint now narrows the search and displays only PO/Rlse records authorized for the logged-in user ID.

  - Requisition — Costpoint now narrows the search and displays only requisition records authorized for the logged-in user ID.

  - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects (owning organization) authorized for the logged-in user ID. In addition, Costpoint

displays only inventory abbreviations with projects and organizations that the requester is authorized for when you do a lookup of the requester.

- A new field, **Organization**, has been added to the screen to display the default value from the purchase order (PO) line or requisition line.

- A new field, **Org Abbrev**, has been added to the screen to display the default value from the inventory abbreviation code.

- Data Entry — If organization security is enabled in the system settings, and the screen is activated for organization security, Costpoint will not allow you to enter or select POs or requisitions associated with the organizations that your user ID does not have full rights to. Costpoint displays error messages for unauthorized entries.

## Create Inventory Allocations (INPALLOC)

The following are the changes to the lookup screen:

- Manufacturing Order — Costpoint now narrows the search and displays only manufacturing orders (MOs) where the logged-in user ID is authorized for the planner's organization ID. Costpoint will not display MOs without the planner's organization ID.

- Purchase Order — Costpoint now narrows the search and displays only POs where the logged-in user ID is authorized for the buyer's organization ID. Costpoint will not display POs without the buyer's organization ID.

- Inventory Issues — Costpoint now narrows the search and displays only inventory issue records where the logged-in user ID is authorized for the **To Organization**. Costpoint will not display records with blank **To Organization**.

- Inventory Transfer — Costpoint now narrows the search and displays only records where the logged-in user ID is authorized for the **To Organization**. Costpoint will not display records with blank **To Organization**.

- Sales Order — Costpoint now narrows the search and displays only sales orders where the logged-in user ID is authorized for the sales order organization ID. Costpoint will not display records with blank sales order organization ID.

- Costpoint will not create allocations to the transactions where the logged-in user is not authorized for, or where the reference organization IDs are left blank.

## Enter Issues to Project/Account/Org or PO (INMPAISS)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the **To Organization**, or the PO/Rlse buyer organization in the **To** group box of the transaction header. When your rights to the header organization ID have been established, Costpoint displays all transaction lines, regardless of your rights to associated projects and organization rights associated with the From Inv Abbrev at the line level.

- Lookup

    - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID. In addition, Costpoint displays only organizations that the material handler is authorized for when you do a lookup of material handler project and organization.

    - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID. In addition, Costpoint displays only projects that the material handler is authorized for when you do a lookup of material handler project and organization.

    - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects authorized for the logged-in user ID. In addition, Costpoint displays only inventory abbreviations that the material handler is authorized for when you do a lookup of material handler project and organization.

- New records (Issue Type=Issue to Project/Account) — When you enter **To Expense Inv Abbrev**, Costpoint defaults to the material organization and organization abbreviation at the header level. In addition, Costpoint now saves organizations of the **To** group box in the inventory transaction table.

- New records (Issue Type=Issue to Purchase Order) — When you enter PO/Rlse and line, Costpoint defaults to the PO line inventory abbreviation in the **To Expense Inv Abbrev** and its associated projects in the **To Project**. In addition, Costpoint now saves organizations of the **To** group box in the inventory transaction table.

## Enter Cost Adjustments (INMCSADJ)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the part to adjust the inventory abbreviation's organization. When your rights to the header organization ID have been established, Costpoint displays all transaction lines, regardless of your rights to associated projects and organization rights associated with the part to adjust the inventory abbreviation's organization.

- Lookup
    - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID. In addition, Costpoint displays only organizations that the adjuster and approver is authorized for when you do a lookup of adjuster/approver project and organization.

    - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID. In addition, Costpoint displays only projects that the adjuster and approver is authorized for when you do a lookup of adjuster/approver project and organization.

    - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects authorized for the logged-in user ID. In addition, Costpoint displays only inventory abbreviation that the adjuster and approver is authorized for when you do a lookup of adjuster/approver project and organization.

- A new field**, Organization**, has been added to the screen. Use this field to enter the organization to be charged for this adjustment.

- A new field, **Org Abbrev**, has been added to the screen. Use this field to enter the organization abbreviation ID to be charged for this adjustment.

- New records — When you enter a part to adjust inventory abbreviation, Costpoint defaults to the material organization and organization abbreviation at the header level. In addition, Costpoint now saves organizations of the **To** group box in the inventory transaction table.

## Enter Quantity Adjustments (INMQTADJ)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the adjusting inventory abbreviation's organization. When your rights to the adjusting inventory abbreviation's organization have been established, Costpoint displays all transaction lines, regardless of your rights to associated projects and organizations.

- Lookup
    - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID. In addition, Costpoint displays only organizations that the material handler and approver are authorized for when you do a lookup of an organization.

    - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID. In addition, Costpoint displays only projects that the material handler and approver are authorized for when you do a lookup of a project.

    - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects authorized for the logged-in user ID. In addition, Costpoint displays only

inventory abbreviations that the material handler and approver are authorized for when you do a lookup of an inventory abbreviation.

- New records — When you enter an adjusting inventory abbreviation, Costpoint defaults to the material organization and organization abbreviation at the header level. In addition, Costpoint now saves the adjusting organization ID in the inventory transaction table.

## Enter Location Transfers (INMLOXFR)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the material handler's organization. When your rights to the material handler's organization have been established, Costpoint displays all transaction lines, regardless of your rights to associated projects and organizations.

- Lookup — Costpoint now narrows the search and displays only inventory abbreviations with projects and organizations authorized for the logged-in user ID. In addition, Costpoint displays only projects and organizations that the material handler is authorized for when you do a lookup of an inventory abbreviation.

- New records — When you enter a material handler, Costpoint defaults to the material organization at the header level on the Employee Salary Information (LDMEHIS) screen. In addition, Costpoint now saves the material hander's organization in the inventory transaction table.

## Create Mass Inventory Transfers (INPMSXFR)

The following are the changes to this screen:

- Lookup — Costpoint now narrows the search and displays only inventory abbreviations with project owning organizations and organizations authorized for the logged-in user ID. In addition, Costpoint displays only inventory abbreviations with projects and organizations that the material handler is authorized for when you do a lookup of an inventory abbreviation.

- Costpoint now saves the material organization linked to the **To Inv Abbrev** in the inventory transaction table.

## Manage Inventory Requests (INMRQST)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the **To Inv Abbrev** organization or **To Organization** on the request header. When your rights to the **To Inv Abbrev** organization or **To Organization** have been established, Costpoint displays all transaction lines, regardless of your rights to associated projects and organizations associated with the **From Inv Abbrev** at the line level.

- Lookup

  - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID. In addition, Costpoint displays only organizations that the requester is authorized for when you do a lookup of an organization.

  - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID. In addition, Costpoint displays only projects that the requester is authorized for when you do a lookup of a project.

  - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects authorized for the logged-in user ID. In addition, Costpoint displays only inventory abbreviations with projects and organizations that the requester is authorized for when you do a lookup of an inventory abbreviation.

- New records — When you enter **To Inv Abbrev**, Costpoint defaults to the material account, material organization, and organization abbreviation at the header level.

## Manage Inventory Reservations (INMPARSV)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights to the **To Organization** on the reservation header. When your rights to the or **To Organization** have been established, Costpoint displays all transaction lines, regardless of your rights to associated projects and organizations associated with the **From Inv Abbrev** at the line level.

- Lookup
    - Organization — Costpoint now narrows the search and displays only organizations authorized for the logged-in user ID. In addition, Costpoint displays only organizations that the requester is authorized for when you do a lookup of an organization.

    - Project — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID. In addition, Costpoint displays only projects that the requester is authorized for when you do a lookup of a project.

    - Inv Abbrev — Costpoint now narrows the search and displays only inventory abbreviations with organizations and projects authorized for the logged-in user ID. In addition, Costpoint displays only inventory abbreviations with projects and organizations that the requester if authorized for when you do a lookup of an inventory abbreviation.

- New records — When you enter **To Inv Abbrev**, Costpoint defaults to the material account, material organization, and organization abbreviation at the header level.

## Print Purchase Price Variance Analysis Report (INRPPV)

When you select Print Options - Standard Costing, Costpoint will not print the purchase order (PO) price variance details by project/PO if logged-in user ID is not authorized for the PO buyer organization, and Costpoint will instead display the following message: PO Variance not printed - Your user ID is not authorized for the PO Buyer Org.

## Create Purchase Price Variance Journal Entry (INPPPV)

When you select Print/Preview/Create, Costpoint processes all records but detailed report will only be displayed for purchase orders (PO) with buyer organization that the logged-in user ID is authorized for.

## Print Inventory Reorder Report (INPREORD)

The following are the changes to this screen:

- Lookup — Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.

- Report — Costpoint now validates header project against the logged-in user ID if **One** or **Range** is selected as an option, and reports are printed by project.

## Print Inventory Transaction History (INRHSTPA)

If organization security is enabled in the system settings, and the screen is activated for organization security, Costpoint will not allow you to select records that your user ID does not have full rights to. Costpoint displays an error message for unauthorized entries.

The transaction type indicated in the inventory transaction and your logged-in user ID authorization determine the records that Costpoint allows you access to.

Costpoint will allow you access to records from the inventory transaction table with the following transaction types and logged-in user ID authorization combination:

| Transaction Type | User ID Authorized for |
|---|---|
| Issue to Project/Account | To Organization |
| Issue to Purchase Order | To Organization |

| Transaction Type | User ID Authorized for |
|---|---|
| Quantity Adjustment | Adjusting Org |
| Scrap Adjustment | Adjusting Org |
| Cost Adjustment | Part to Adjust Inv Abbrev's Org |
| Project/Account Transfer | Organization |
| Location Transfer | Material Handler's Org |
| Miscellaneous Receipt | Material Handler's Org |

### Load Organization IDs (INPLDORG)

Use this new screen (**Materials » Inventory » Inventory Utilities » Load Organization IDs**) to load or default material handler's organizations for miscellaneous receipts and location transfer IDs. This utility automatically runs in the backend to populate the inventory transaction table for the other inventory transaction types such as Issue to Purchase Order (ISSUEPO), Issue to Manufacturing Order (ISSUEMO), Quantity Adjustment (ADJQTY), Cost Adjustment (ADJCST), Scrap Adjustment (ADJSCRAP), Project/Account Transfer (TRNFPAO), PO Receipt (TRNFRCPT). It populates either the owning organization linked to the project or the material organization linked to the inventory abbreviation associated with the inventory transaction.

### View Inventory Transaction History (INQHSTPR)

Costpoint now narrows the search and displays only inventory transactions with organizations authorized for the logged-in user ID.

### View Part Inventory (INQPINV)

Costpoint now narrows the search and displays only projects for which you want to do an inventory with organizations authorized for the logged-in user ID. In addition, Costpoint now narrows the search and displays only projects with owning organizations authorized for the logged-in user ID.

### Import Inventory Transactions (AOPINTRN)

Costpoint now loads/populates values in the inventory transaction table.

### Enter Miscellaneous Inventory Receipts (RCMMSRC)

The following are the changes to this screen:

- A new field**, Organization**, has been added to the screen. Use this field to enter the material handler employee's organization ID.

- Data Entry — If organization security is enabled in the system settings, and the screen is activated for organization security, Costpoint will not allow you to enter or select records that your user ID does not have full rights to. Costpoint displays error messages for unauthorized entries.

- Find/Query — Costpoint now finds and filters existing records based on your logged-in user ID's organization rights.

## INMRQSTLIB Library

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

- Manage Inventory Reservations (INMPARSV)
- Manage Inventory Requests (INMRQST)

## System Requirements

This enhancement requires the following:

- cp711_cmnlib_INMRQSTLIB_001.zip

- cp711_sys_043.zip

## INMADJLIB Library

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

- Enter Quantity Adjustments (INMQTADJ)

- Enter Scrap Adjustments (INMSCADJ)

### System Requirements

This enhancement requires the following:

- cp711_cmnlib_INMADJLIB_001.zip

- cp711_sys_043.zip

# Administration

There are no changes to the Administration domain for this release.

# Reports & Analytics

## Role-Based Dashboards: Limitation on the Number of Dashparts Displayed

The number of dashparts that display on the Dashboard Reports tab depends on the number of dashparts you have open on the Parameters tab and your screen resolution. For example, if your screen resolution is lower than 1680 pixels, not all eight dashparts opened on the Parameters tab will be displayed on the Reports tab.

As a workaround, you can do any of the following:

- Toggle between the Parameters and Reports tabs to add (open) and remove (close) dashparts that you want to view.

- Drag the dashpart table windows up or down on the Parameters tab to rearrange the dashparts. Costpoint displays the dashparts on the Reports tab in the order that they appear on the Parameters tab, first to last.

- Set your screen resolution to 1920 pixels, which is the recommended resolution to view all dashparts. Note, however, that if your screen does not support 1920 pixels, you will not be able to set that resolution.

# Costpoint Integration

## Deltek Talent Management Integration Enhancements

This Costpoint release provides the following enhancements to Costpoint - Deltek Talent Management integration:

- Automatically assign employee IDs and accept partial employee records

- Onboarding of rehired employees

- Populate the **Last Day Worked** field based on the termination date

### Pre-Installation Information

This enhancement requires the following Costpoint 7.1.1 releases:

- System JAR 037

- PATCH3321

- PATCH3218

- ▪ PATCH3224
- ▪ PATCH3454
- ▪ PATCH3457

## Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

| Domain | Module | Application ID | Application Name | Application Files |
|---|---|---|---|---|
| Administration | System Administration | SYPCOMP | Set Up Company | cp711_sypcomp_021.zip |
| People | Employee | AOPUTLEL | Import Employee Data | cp711_aoputlel_016.zip |
| People | Employee | EMMIDDEFAULT | Manage Employee Defaulting Rules | cp711_emmiddefault_001.zip |
| People | Employee | EMMIDFORMAT | Manage Employee ID Formats | cp711_emmidformat_001.zip |
| People | Employee | EMPHRSDAT | Transfer Talent Management Data | cp711_emphrsdat_015.zip |
| People | Employee | EMPTMUI | Link Talent Management User IDs to Existing Employees | cp711_emptmui_001.zip |
| People | Employee | LDMEINFO | Manage Employee Information | cp711_ldmeinfo_022.zip |
| People | Labor | LDMLABOR | Configure Labor Settings | cp711_ldmlabor_008.zip |
| People | Payroll | PRQEINFO | View Employee Information | cp711_prqeinfo_005.zip |

## Automatically Assign Employee ID and Import Partial Employee Records

This release provides the ability to auto-generate employee IDs in Costpoint. If you use Deltek Talent Management, you can now import employee records that do not have employee ID values and allow Costpoint to auto-generate the IDs. The auto-generate employee ID function is available to all Costpoint users when manually entering an employee record. Only Deltek Talent Management users may import employees without employee IDs and have them auto generated.

**Warning:** If you use Deltek Talent Management; after you download this feature from DSM, you must perform the applicable procedure in the Initialize Talent Management HUA ID-to-Costpoint Employee ID Mapping section. Otherwise, the integration process between Costpoint and Deltek Talent Management will no longer function.

## Configure Labor Settings (LDMLABOR)

- The Employee Options tab contains a new **Auto-Generate Employee IDs** check box enables the functionality to automatically generate IDs for new employees. This check box displays as selected and disabled if you select the **Auto-Generate Employee IDs for All Companies** check box on the Corporate Labor Settings subtask. This functionality is currently only available for Deltek Talent Management users.

- The Corporate Labor Settings subtask contains a new **Auto-Generate Employee IDs for All Companies** check box. Select this check box to enable Costpoint to automatically generate new employee IDs for companies within the corporation.

## Import Employee Data (AOPUTLEL)

If you select the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen, the following error message displays when you attempt to open the Import Employee Data screen: "When auto-generation of employee IDs is enabled in your company's Configure Labor Setting screen, you may not import any new employee IDs."

## Link Talent Management User IDs to Existing Employees (EMPTMUI)

When you run this new toolkit, it will populate the Costpoint Employee (EMPL) table with each applicable employee's Deltek Talent Management user ID (HUA ID). It will also set the **Active HUA ID Mapping** flag which indicates whether the Costpoint Employee has an active or inactive mapping to the HUA ID.

**Attention:** The timing of this toolkit depends on whether you're an existing Costpoint 7.1.1 user, an existing Deltek Talent Management user, an existing client for both Costpoint 7.1.1 and Deltek Talent Management, or a new user for both products.

You must run this toolkit after installing the Auto-Assign Employee IDs feature and before importing or exporting employees in the Transfer Talent Management Data screen. Running this toolkit will populate the Deltek Talent Management HUA ID (HUA_ID) and Active HUA ID Mapping (HUA_ACTV_MAP_FL) columns in the Manage Employee Information (EMPL) table.

For detailed steps on using this toolkit, please refer to the Talent Management HUA ID-to-Costpoint Employee ID Mapping Initialization Scenarios section.

## Manage Employee ID Defaulting Rules (EMMIDDEFAULT)

Use the new Manage Employee Defaulting Rules screen to enter and manage defaulting rules for your employee ID format codes.

**Note:** You can access the Manage Employee ID Defaulting Rules screen only if you select the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen. Otherwise, an error will display when you attempt to open the application.

You must establish employee ID defaulting rules in the following scenarios:

- If you selected the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen for companies, you must establish employee ID defaulting rules for each of company that has this labor setup.

- If you selected the **Auto-Generate Employee IDs for All Companies** check box on the Corporate Labor Settings subtask of the Configure Labor Settings screen, you must establish at least one defaulting rule for all companies or you can establish defaulting rules for each company.

To launch the screen, go to the **People » Employee » Employee Controls** menu.

## Manage Employee ID Formats (EMMIDFORMAT)

Use the new Manage Employee ID Formats screen you to establish the formatting of employee IDs. Costpoint will use this format when you opt to auto-generate the employee IDs.

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**Note:** You can access the Manage Employee ID Formats screen only if you select the Auto-Generate Employee IDs check box on the Configure Labor Settings screen. Otherwise, an error will display when you attempt to open the application.

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To launch the screen, go to the **People » Employee » Employee Controls** menu.

## Manage Employee Information (LDMEINFO)

The following are updates on the Manage Employee Information screen:

- A new **HUA ID** field allows you to enter the Talent Management user ID for the employee. The application uses this field to map Costpoint employee IDs to Deltek Talent Management user IDs when you import employee data into Costpoint.

- A new **Talent Management Active HUA ID Mapping** check box indicates whether or not the specified HUA ID is actively mapped to the Costpoint employee. If this check box displays as selected, the Transfer Talent Management Data application uses the specified HUA ID to determine whether or not the employee is a rehire.

- The application performs a validation to check the staging database tables when an adding an employee.

## Print Data Dictionary Report

The Print Data Dictionary Report application now provides information for the following new columns on the Employee (EMPL) table:

- **HUA_ACTV_MAP_FL** — Flag that indicates if the employee's HUA ID is active.

- **HUA ID** — HUA ID sent from Talent Management.

## Set Up Company (SYPCOMP)

When you create a new company, the application populates the EMPL_ID_AUTOGEN_FL column in the LAB_SETTINGS database based on the values of the company being copied.

## Transfer Talent Management Data (EMPHRSDAT)

- When you run the Transfer Talent Management Data process, the application generates employee IDs for imported Deltek Talent Management employee records without IDs.

- The application adds employee records to staging database tables if the Deltek Talent Management records are missing any required fields. The application will not add records to staging database tables if the employee ID is missing and auto-generation of employee IDs is not enabled.

- The application performs validations to ensure that the imported file from Deltek Talent Management contains all fields required to generate an employee ID. The application will not add records to the staging database tables if it could not generate an employee ID.

- The application removes the employee records from the staging database tables once a complete employee record is sent from Deltek Talent Management.

- The application uses the following staging database tables:
  - EMPL_STG
  - EMPL_PHONE_STG
  - EMPL_LAB_INFO_STG

- DFLT_REG_TS_STG
- EMPL_TAX_STG

### View Employee Information (PRQEINFO)

The screen contains new a **HUA ID** field and a **Talent Management Active HUA ID** Mapping check box. These display the information from the same fields on the Manage Employee Information screen.

## Onboarding of Rehired Employees

This feature provides the ability to include rehires when importing employees that have completed the onboarding process in Deltek Talent Management. Importing of an existing Costpoint employee ID that was rehired to a different company is **not** supported at this time.

### Manage Employee Information (LDMEINFO)

The application was updated to support the processing of rehired employee records that were imported from Deltek Talent Management to Costpoint through the Transfer Talent Management Data process.

### Transfer Talent Management Data (EMPHRSDAT)

The following are the updates to the Transfer Talent Management Data screen for the onboarding of rehires:

- The application process can now identify new hires and rehires. It also determines and identifies when a new employee record needs to be generated or if an existing record will be updated.

- When exporting employees, the application will not include employee records that does not have an active mapping to a HUA ID (Talent Management User ID). An employee record does not have an active mapping if the **HUA_ID_ACTV_AP_FL** column is **N**.

- When importing rehires, if the employee record in Costpoint indicates that the employee is still employed (either the **Termination Date** field is blank or the **Termination Date** value is later than the rehire date), an error will be logged, and the rehired employee will not be imported.

## Populate the Last Day Worked Field Based on the Termination Date

When you enter a value in the **Termination Date** field on the Manage Employee Information screen, the screen displays a warning message which provides you the option to populate the **Last Day Worked** field with the date that you entered in the **Termination Date** field. If you decline the option to auto-populate the **Last Day Worked** field, you must manually enter a date in the **Last Day Worked** field before saving the record.

Existing termination records will not be affected by this update and the warning message will only display for future termination records.

## Initialize Talent Management HUA ID-to-Costpoint Employee ID Mapping

Before you use Costpoint's Auto-Assign Employee ID feature, you must run the Link Talent Management User IDs to Existing Employees (EMPTMUI) toolkit based on your current Costpoint/Deltek Talent Management setup.

You must run the Link Talent Management User IDs to Existing Employees toolkit after downloading the Auto-Assign Employee IDs feature and before importing or exporting employees in the Transfer Talent Management Data screen. Running this toolkit will populate the HUA ID and Active HUA ID Mapping columns in the Manage Employee Information table (EMPL.HUA_ID and EMPL.HUA_ACTV_MAP_FL).

### Scenarios

Refer to the following scenarios and perform the corresponding steps that apply to your company's setup:

#### Scenario 1

**You currently use both products, Costpoint 7.1.1 and Deltek Talent Management, and you installed Costpoint's Auto-Assign Employee ID feature which was released in June 2018.**

| Step | Product | Details |
|------|---------|---------|
| **1** | Deltek Talent Management | Generate the **export_user_id_file** file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| **2** | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the **People » Employee » Employee Utilities » Link Talent Management User IDs to Existing Employees** toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |
| **3** | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs. <br><br>**Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file. <br><br>▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 4. <br>▪ If you do **not** want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |
| **4** | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| **5** | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings** screen, select the Labor option in the Individual Settings group box, and then run the application process. |

## Scenario 2

**You currently use Deltek Talent Management and you purchased Costpoint version 7.1.1 after May 2018.**

| Step | Product | Details |
|------|---------|---------|
| **1** | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, and ensure that the Auto-Generate Employee IDs check box is not selected. <br><br>**Note:** If the Auto-Generate Employee IDs check box is selected, clear the check box. After saving your changes, go to the Rebuild Global Settings screen, select the Labor option in the Individual Settings group box, and then run the application process. |
| **2** | Costpoint | Create employee records in Costpoint. You can create employee records by performing either of the following methods: <br><br>▪ Entering employee records on **People » Employee » Basic Employee Information » Manage Employee Information** screen |

| Step | Product | Details |
|------|---------|---------|
| | | ▪ Importing an employee file on **People » Employee » Employee Interfaces » Import Employee Data** screen. |
| **3** | Deltek Talent Management | Manually assign the newly created Costpoint employee IDs to your existing Talent Management users. |
| **4** | Deltek Talent Management | Generate the export_user_id_file file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| **5** | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the **People » Employee » Employee Utilities » Link Talent Management User IDs to Existing Employees** toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |
| **6** | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs. |
| | | **Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file. |
| | | ▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step **4**. |
| | | ▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |
| **7** | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| **8** | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings**, select the Labor option in the Individual Settings group box, and then run the application process. |

### Scenario 3

**You currently use Costpoint 7.1.1 and you purchased Deltek Talent Management after May 2018.**

| Step | Product | Details |
|------|---------|---------|
| 1 | Costpoint | Go to **People » Employee » Employee Interface » Transfer Talent Management Data** screen, and run a full export of the following:<br><br>▪ Employees<br><br>▪ Organizations<br><br>▪ Job Templates<br><br>▪ Detail Job Titles<br><br>▪ Labor Locations |

| | | Note: You may opt to exclude employees that were terminated before a specific date. |
|---|---|---|
| 2 | Deltek Talent Management | Generate the **export_user_id_file** file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| 3 | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |
| 4 | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs. <br><br> **Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file. <br><br> ▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 5. <br><br> ▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |
| 5 | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| 6 | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings** screen, select the Labor option in the Individual Settings group box, and then run the application process. |

## Scenario 4

**You purchased both products, Costpoint 7.1.1 and Deltek Talent Management, after May 2018.**

| Step | Product | Details |
|---|---|---|
| **1** | Costpoint | Create employee records in Costpoint. You can create employee records by performing either of the following methods: <br><br> Entering employee records on **People » Employee » Basic Employee Information » Manage Employee Information** screen |

| Step | Product | Details |
|------|---------|---------|
| | | Importing an employee file on **People » Employee » Employee Interfaces » Import Employee Data** screen. |
| 2 | Costpoint | Go to **People » Employee » Employee Interface » Transfer Talent Management Data** screen, and run a full export of the following:<br><br>▪ Employees<br>▪ Organizations<br>▪ Job Templates<br>▪ Detail Job Titles<br>▪ Labor Locations |
| 3 | Deltek Talent Management | Generate the **export_user_id_file** file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| 4 | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |
| 5 | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs.<br><br>**Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.<br><br>▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 6.<br>▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |
| 6 | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| 7 | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings** screen, select the Labor option in the Individual Settings group box, and then run the application process. |

## Errors

All warnings and errors are written to a log file (EMPTMUI_yymmddhhTms.log). The log file will be saved in the location that you specified in the **File Location** field of the Link Talent Management User IDs to Existing Employees toolkit. If a location has not been specified, warnings and errors will be written to the database and you can retrieve it from the File Download (SYMDLMGR) screen.

## Known Issues

## Employees not Terminated in Costpoint were Processed as a Rehire

**Deltek Defect Tracking Number: 963051**

**Description:** When the **Talent Management Active HUA ID Mapping** column contains a value of No and the employee has not been terminated in Costpoint, the Transfer Talent Management Data screen still allows you to successfully import a rehired employee record into Costpoint.

Regardless of the value of **Talent Management Active HUA ID Mapping** column, the processing of rehires should not be successful if the Costpoint employee record has no termination date.

**Customers Impacted:** This defect affects Costpoint - Deltek Talent Management Integration users.

**Workaround Before Fix:** None.

**Additional Notes:** The application performs a validation only if the employee has both a termination date and an active HUA ID mapping. The HUA ID mapping must be active if there is no termination date as of the Deltek Talent Management hire date.

# Budgeting and Planning

## Budgeting Administration

### Project Security Options Expanded

A **Project Security to be Based On** option was added to the Project tab of the Configuration Settings (MAM10) screen. Options include **Org ID** or **Project Budget Security**.
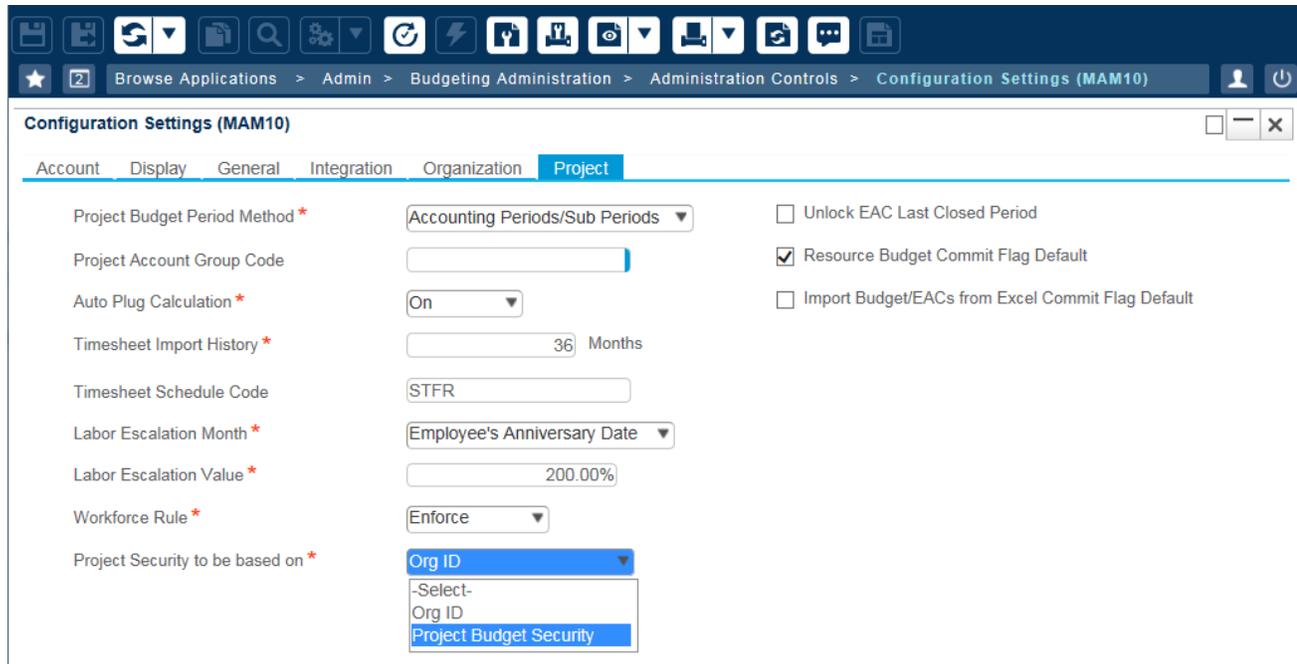


Prior to this enhancement, project security was automatically based on Org ID, which is still the default setting.

This configuration setting was primarily added to support the forthcoming **Maintain Project Budget Security** screen that is scheduled for release in **August 2018**. The new screen will enable Project Budget Accountants to separate Project Budget Creators and Project Budget Approvers similar to Org Budgeting.

Switching this setting to **Project Budget Security** allows Project Managers to view and edit all assigned budgets. If security is based on Org ID, and for example, a Project manager has a Home Org of an Overhead type, he or she could not edit project budgets and associated resources that have a Direct type of Home Org, such as Engineering or Construction.

**Requirements**

The enhancement requires:

cp711_bp_bnp_bammam10_009.zip

cp711_bnp_common_007.zip

**Application JAR Requirements**

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

| Domain | Module » Application Group | Application ID | Application Name | Application File |
|---|---|---|---|---|
| Admin | **Budgeting Administration » Administration Controls** | BNP_BAMPBA | **Maintain Project Budget Security** | cp711_bp_bnp_bammam10_009.zip |

# Time and Expense

## Time

There are no updates in this area.

## Expense

### Enhancement

#### Expense Authorization Attachment Subtask Conversion

To improve usability, the Attachment subtask in Manage Expense Authorization and Manage/Approve Expense Authorizations was converted to a tab.
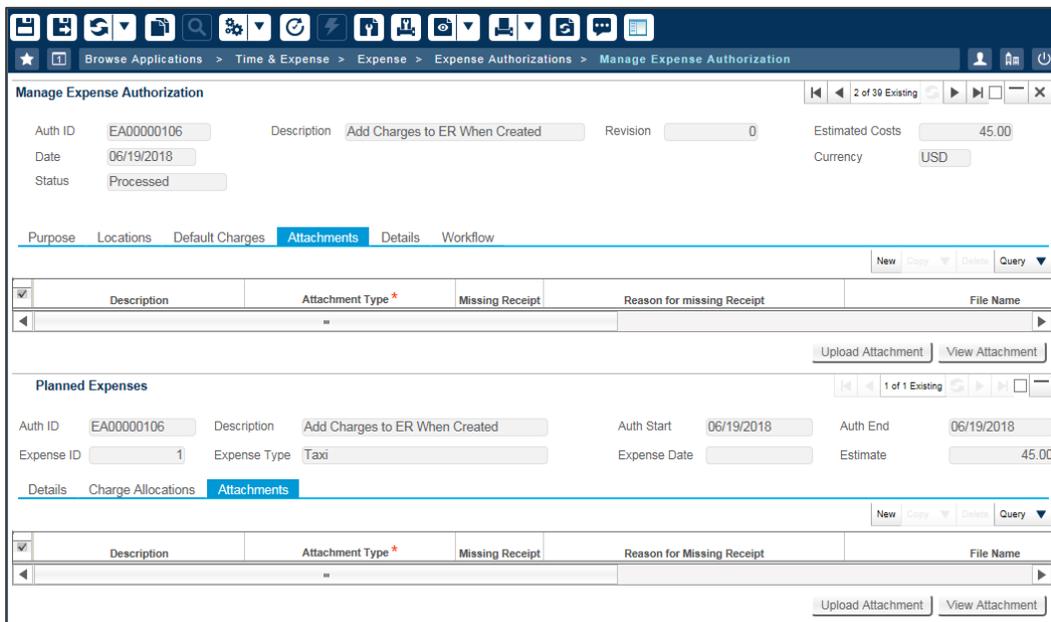


Prior to this change, the Attachments displayed as subtask link, as shown below:
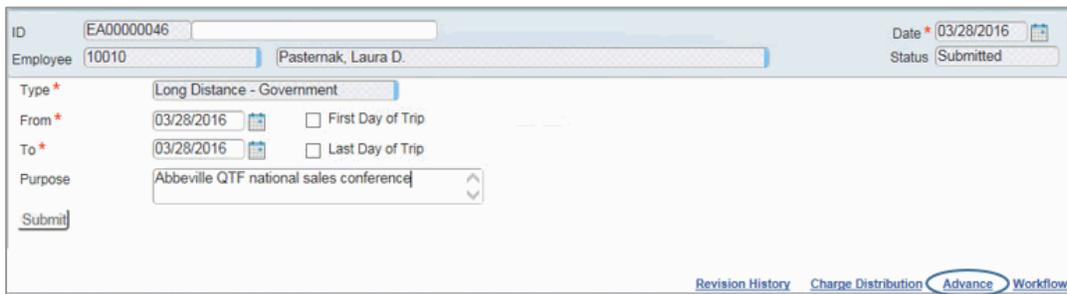


This enhancement was applied to Manage Expense Authorization and Manage/Approve Expense Authorizations.

#### Expense Report Attachment Subtask Conversion

To improve usability, the Attachment subtask in Manage Expense Report and Manage/Approve Expense Reports was converted to a tab. This change also supports the upcoming Expense Wizard, scheduled for release later in 2018.

Prior to this change, the Attachments displayed as subtask link, as shown below:



This enhancement was applied to Manage Expense Report and Manage/Approve Expense Reports.

# Configuration

There are no updates in this area.

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