



Deltek

Deltek Costpoint® 7.1.1

Buyer Dashboard

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Contents

Overview	1
Patch and System JAR Requirements	1
Application JAR Requirements.....	1
Materials Domain	2
Buyer Dashboard (PODBUYER).....	2
Manage Buyer Actions (POMBACT).....	3
Appendix: For Additional Information.....	7
Deltek Support Center	7
Access Deltek Support Center.....	7

Overview

Welcome to Deltek Costpoint 7.1.1 Release Notes. These release notes contain a summary of new enhancements available in this release.

The Buyer Dashboard is a new feature within Costpoint Purchasing that will allow buyers to quickly access purchase orders (PO) with action changes requested by suppliers/vendors and update PO information.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 050 (cp711_sys_050.zip)
- cp711_cmplib_POMPOLIB_005.zip

Application JAR Requirements

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

Domain	Module	Application Name	Application ID	Application File
Materials	PO	Buyer Dashboard	PODBUYER	cp711_podbuyer_001.zip
Materials	PO	Manage Buyer Actions	POMBACT	cp711_pombact_001.zip

Materials Domain

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

Buyer Dashboard (PODBUYER)

This is a new application (**Materials » Purchasing » Dashboards/Actions » Buyer Dashboard » Parameters | Reports**) that buyers can use to view/update information relevant to their purchase orders (PO).

When you open the application, you will see the dashboard screen with information for the following five (5) dashparts:

- Pending Buyer Action (across Purchase Orders): Costpoint automatically populates this dashpart with bars that indicate the number of PO/delivery schedule lines (across multiple POs) in conditions that need buyer action. You can click the bar hyperlink to go to the Manage Buyer Actions (POMBACT) screen where the corresponding PO/PO lines are loaded. This dashpart has the following pending buyer actions:
 - Change Requests
 - Change Request Accepted
 - Change Request Rejected
 - Cancel Request
 - Cancel Request Accepted
 - Cancel Request Rejected
 - Backorder Requests
 - Substitution Requests

Note: This dashpart is not available if you are not licensed for Supplier Portal.

- Past Due Deliveries: Costpoint automatically populates this dashpart with bars that indicate the number of days that the supplier is late in fulfilling the PO line order. You can click the bar hyperlink to go to the Manage Buyer Actions screen, where the corresponding PO/PO lines are loaded. By default, the ranges for this dashpart have been set to increments of 10 (for example, 10, 20, and 30, respectively, for ranges 1–3). You can set the ranges by clicking **Parameters** from the breadcrumb trail (**Materials » Purchasing » Dashboards/Actions » Buyer Dashboard » Parameters | Reports**) and define up to 10 ranges for this dashpart. Costpoint will only display those that have been defined, and you have the option to hide this dashpart.
- Pending Release to Supplier (by Purchase Order): This dashpart displays a list of POs that have at least one (1) PO line, with or without delivery schedule lines, that has not been released to the supplier. You can click the PO hyperlink to go to the Manage Buyer Actions screen, where the corresponding PO/PO lines are loaded for the selected PO.
- Pending Buyer Action (by Purchase Order): This dashpart displays a list of POs that have at least one (1) PO line or delivery schedule line with pending buyer action. You can click the PO hyperlink to go to the Manage Buyer Actions screen, where the corresponding PO/PO lines are loaded for the selected PO.

Note: This dashpart is not available if you are not licensed for Supplier Portal.

- **Open Purchase Order:** This dashpart displays a list of POs that have at least one open PO line, regardless of the **Last Action** value. You can click the PO hyperlink to go to the Manage Buyer Actions screen, where the corresponding PO/PO lines are loaded for the selected PO.

The list of POs included in the dashparts is based on the following conditions:

- PO company matches that of the logged-in user.
- PO buyer ID matches that of the logged-in user.
- User ID of the logged-in user is validated for organization security authorization.
- PO line/delivery line action is not blank and based on current **Action**.
- PO line status is Open.

From the dashboard, you can click the hyperlink to go to the particular PO/line/delivery schedule line, and take the necessary action on the Manage Buyer Actions (POMBACT) screen; you can also add notes to suppliers. The actions you take and the notes you add are logged and saved as history of actions and associated notes, which you can go back to when needed.

Manage Buyer Actions (POMBACT)

This is a new application (**Materials » Purchasing » Dashboards/Actions » Manage Buyer Actions**) that buyers are automatically taken to when they click the following buyer dashboard bars on the Buyer Dashboard screen.

- **Pending Buyer Action (across Purchase Orders):** If you open this screen by selecting a row from the list of POs in the Pending Buyer Action (across Purchase Order) dashpart, Costpoint loads all PO/delivery schedule lines (across multiple POs) in states that need buyer action.
- **Pending Buyer Action (by Purchase Order):** If you open this screen by selecting a row from the list of POs in the Pending Buyer Action (by Purchase Order) dashpart, Costpoint loads all PO lines for the selected PO with one of the following actions:
 - Change Request by Supplier
 - Change Request Accepted by Supplier
 - Change Request Rejected by Supplier
 - Cancel Request by Supplier
 - Cancel Request Accepted by Supplier
 - Cancel Request Rejected by Supplier
 - Backorder Request by Supplier
 - Substitution Request by Supplier

If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line along with quantities and due dates from the delivery schedule.

- **Open Purchase Orders:** If you open this screen by selecting a row from the list of POs in the Open Purchase Orders dashpart, Costpoint loads all PO lines with an open quantity and an order quantity greater than zero (0) for the selected PO, regardless of action.

If the PO line has zero order quantity, Costpoint loads the PO line with greater than zero (0) open amount.

- Pending Release to Supplier (by Purchase Orders): If you open this screen by selecting a row from the list of POs in the Pending Release to Supplier dashpart, Costpoint loads all POs with blank **Last Action** value. For PO lines with at least one delivery schedule row with Pending Supplier Acknowledgment (PSA) as new action, the rest of the delivery schedule lines with blank last action value will automatically change to PSA.
- Past Due Deliveries: This screen opens to the default settings discussed below. For more information on customizing the ranges, please see dashparts information as discussed in the [Buyer Dashboard](#) (Past Due Deliveries) section.
 - If you open this screen by selecting **≤ 10** bar on the dashboard, Costpoint loads all PO lines that match the company and buyer ID with that of the logged-in user that are ten (10) days or less overdue, and have an Open PO line status. PO lines with blank **Action** value are excluded. You can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If a delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - If you open this screen by selecting **11–20** bar on the dashboard, Costpoint loads all PO lines that match the company and buyer ID with that of the logged-in user that are 20 days or less, overdue and have an open PO line status. PO lines with blank **Action** value are excluded. You can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If a delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - If you open this screen by selecting **21-30** bar on the dashboard, Costpoint loads all PO lines that match the company and buyer ID with that of the logged-in user that are 30 days or less overdue and have an open PO line status. PO lines with blank **Action** value are excluded. You can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If a delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
 - If you open this screen by selecting **> 30** bar on the dashboard, Costpoint loads all PO lines that match the company and buyer ID with that of the logged-in user that are more than 30 days overdue and have an open PO line status. PO lines with blank **Action** value are excluded. You can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action, Proposed Order Qty, Proposed Amt, Proposed Due Date, and Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If a delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

- **Email Alerts:** When a buyer saves a new action information on the PO or delivery schedule line, the system generates an email notification to the supplier if the Supplier Portal Email Notification check box on the Manage Purchase Orders screen is selected. The sent emails will have hyperlinks to the PO, which will take them directly to the Manage Supplier Actions screen.

In addition, you can directly access the PO on the Manage Purchase Orders screen by clicking on the PO ID hyperlink from the Manage Buyer Actions screen.

The Action History subtask shows the history of any action change along with the communication notes. Costpoint displays all rows associated with the particular PO, release, and PO/delivery line regardless of the change order number. Information in this section is based on the changes made to the Action Information tab on the Manage Purchase Orders screen.

Buyers can select the following action options:

- **Pending Supplier Acknowledgment:** This option indicates that the PO line and all associated delivery schedule lines have been submitted to the supplier.
- **Change Request by Buyer:** This option indicates that there is a proposed change to the PO/delivery schedule line quantity/amount or due date.
- **Change Request Accepted by Buyer:** This option indicates that the buyer has accepted the change proposed by the supplier regarding the PO/delivery schedule line quantity/amount or due dates.
- **Change Request Rejected by Buyer:** This option indicates that the buyer has rejected the change proposed by the supplier regarding the PO/delivery schedule line quantity/amount or due dates.
- **Cancel Request by Buyer:** This option indicates that the buyer has requested a PO/delivery schedule line order cancellation.
- **Cancel Request Accepted by Buyer:** This option indicates that the buyer has accepted a PO/delivery schedule line order cancellation request made by the supplier.
- **Cancel Request Rejected by Buyer:** This option indicates that the buyer has rejected a PO/delivery schedule line order cancellation request made by the supplier.
- **Backorder Request by Accepted by Buyer:** This option indicates that the buyer has accepted the supplier's request to put the order on the PO/delivery schedule line on backorder.
- **Backorder Request by Rejected by Buyer:** This option indicates that the buyer has rejected the supplier's request to put the order on the PO/delivery schedule line on backorder.
- **Substitution Request Accepted by Buyer:** This option indicates that the buyer has accepted the supplier's request to substitute a different part other than what was on the PO line.
- **Substitution Request Rejected by Buyer:** This option indicates that the buyer has accepted the supplier's request to substitute a different part other than what was on the PO line.

Note: The Change Order – Pending Supplier Acknowledgment action is not immediately available in the options. The system automatically reflects this action when the buyer implements the changes via the **Implement Action Changes** button at the PO header level, after you manually created a change order.

This action option is also automatically reflected in the system when the buyer manually creates a change order (via the Create Purchase Order Change Orders screen) and manually updates the order quantity/amount or due date on a PO line or delivery schedule. This only applies to PO lines (or delivery schedule lines) that have been modified after creating the change order.

Note: The Updated by Buyer action is not immediately available in the options. The system automatically reflects this action when the buyer implements the changes via the **Implement Action Changes** button at the PO header level, without manually creating a change order.

This action option is also automatically reflected in the system when the buyer manually changes the order quantity, amount, or due date on a PO line or delivery schedule, without manually creating a change order.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

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

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