Deltek Costpoint® Enterprise Cloud

Cloud Release Notes January 2018

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Contents

Overview

This document describes enhancements made in Costpoint, Budgeting and Planning, and Time & Expense between mid-October 2017 and mid-January 2018.

These enhancements will be applied in the non-production environment January 23-24, 2018. They will be applied in the production environment February 20-21, 2018.

Calendar year-end enhancements were provided in a separate document (*DeltekCostpointEnterpriseCloudCalendarYearEndReleaseNotes.pdf*) in December 2017.

Costpoint

Accounting

Changes were made in the Accounting domain in relation with the new Contract Management feature. To know more about this new feature, see the *DeltekCostpoint711LAReleaseNotesContractManagment.pdf*.

CAGE Code Field on the Manage Vendors Screen

A new field is now available on the Manage Vendors (APMVEND) screen where you can track the CAGE Code of your vendors.

CAGE Code Field in the Import Vendors Report

A new CAGE Code field is now available in the Import Vendors Report where you can view your vendors' CAGE Code.

Projects

Contract Management

Costpoint now provides additional contract management capabilities through the new Contract Management module available in the Projects domain. With this module, you can:

- Track opportunities within Costpoint and use this information to initiate a contract or a project.
- Track bid and proposal costs from the opportunity to a Costpoint project.
- Track organizational conflicts of interest (OCIs) and link them to opportunities, contracts, and/or projects.
- Manage contract or flow-down clauses between prime contractors and subcontractors.
- Manage customer, vendor, and employee information.
- Streamline the project initialization process.
- Track information from the beginning of the opportunity through contract closeout.

You can manually add opportunities to this module or import opportunity data from GovWin IQ.

In this limited availability (LA) release, .the functionality to import opportunities from GovWin IQ is not yet available. GovWin IQ integration for Contract Management together with the new Import GovWin IQ Data screen will be rolled out in the general availability (GA) release.

Once you win the opportunity, you can create a contract and link it to the opportunity. You have the option to associate the contract to a Costpoint opportunity, and also create a contract for an opportunity that does not exist in your Costpoint database. You can create and monitor subcontract information and link subcontract records to contracts and projects.

Within the opportunities, contracts, and and/or subcontracts screen, you have the ability to:

- Add activities and documents related to the opportunity, contract, and/or subcontract.
- Identify employees and other team members who will be working on the opportunity, contract, and/or subcontract.
- Create and/or update contract/subcontract modifications.

- Initialize projects to include information that already exists in the Contract Management module.
- View projects linked to the opportunity, contract, and/or subcontract.
- View and print a project status report (PSR)

Screens that you can use to set up and maintain overall settings for Contract Management are also available in this module.

For an overview demonstration of this feature, refer to Costpoint 7.1.1 Contract Management Overview video, which you can view at

https://help.deltek.com/Product/Costpoint/USS/Projects/ContractManagementOverview .

Vendor and Vendor Employee Validation in Manage Vendors

In support of the future implementation of the Contract Management feature, a new validation was added to the Manage Vendors (APMVEND) application.

The Vendor ID and Vendor Employee IDs in APMVEND are checked to determine if there are duplicates in the Contract Management tables.

This enhancement has no impact on current functionality.

The functionalities of this update/enhancement is not available until the full feature is released.

People

Override Tax ID in the Company Identification in ACH Bank File

This enhancement accommodates the ACH bank file issue of Companies with subsidiaries that are under one taxable entity. Companies with this setup can use this enhancement if they want to distinguish the bank files for the main company's direct deposit and each of the subsidiaries direct deposit.

For this purpose, the Create ACH Bank File screen now allows you to override the Taxable Entity's tax ID and enter a Company Identification. The Create ACH Bank File screen contains the following new check box and field:

- **Override Tax ID in the Company Identification Field (Record) 5** — Select this check box to substitute the Tax ID in Record 5 with the specified Company Identification.
- **Company Identification** — Enter the Company Identification for Position 41 - 50 in the Company/Batch Header Record.

Add GovWin IQ Login ID on Employee Records

Costpoint now provides the ability to add GovWin IQ login IDs to Costpoint Employee records. This will allow you to link Costpoint Employees to the GovWin IQ users in Costpoint Contract Management. To implement this functionality, a new **GovWin IQ ID** field is now available on Product Interface tab of the Manage Employee Information screen which you could use to enter the employee's GovWin IQ login ID.

Use Reference Date for Record Selection in Payroll

Costpoint now provides the option to use the reference dates on checks when selecting **X**, **Y**, **Z**, **V**, and **W** type records in multiple payroll applications. You can select the new **Use Reference Date for X, Y, Z, V, and W Records** check box on the Configure Payroll settings screen to enable this functionality. This option applies only to taxes and does not include deduction limit calculations.

If you enable this feature, payroll applications will select records using the reference date on an employee's check. If a reference date does not exist or if you opt not to enable this feature, payroll applications will select records using the check date.

The following applications were updated to support this enhancement:

- Configure Payroll Settings (PRMPRSET)
- Compute Payroll (PRPCPR)
- Create Accounts Payable Vouchers (PRPAPVCH)
- Create EFTPS Payroll Tax Deposit File (PRPPRTD)
- Create Monthly SUTA Tax File (PRPSTF)
- Create Quarterly EFTPS FUTA Tax File (PRPFQTD)
- Create Quarterly SUTA Tax File (PRPSMM)
- Create W-2 Table (PRPCW2)
- Manage Employee Earnings History (PRMERF)
- Manage Payroll Records (PRMPTF)
- Recompute Taxable Wages (PRPRCOMP)
- Print Data Dictionary Report (SYRDD)
- Print Local Withholding Report (PRRLCWH)
- Print Quarterly Federal Tax Report (PRRFDTAX)
- Print Quarterly State Unemployment Report (PRRSTTAX)
- Print Soc Sec and Medicare Reconciliation Report (PRRFICA)
- Print State Withholding Report (PRRSTWH)
- Set Up Company (SYPCOMP)
- View Help About (SYMABOUT)

Known Issues

This section includes summaries of the issues that exist in Deltek Costpoint and will be resolved in the future. You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. The additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

This section does not contain a complete list of outstanding issues. Deltek only includes the high priority issue in Deltek Costpoint for this release. Please contact Deltek Customer Care if these known issues present a significant impact on your business.

Create Quarterly SUTA Tax File (PRPSMM)

- **Defect 844726**

  Description: When you select the **Use Reference Date for X, Y, Z, V and W Records (Applies to Taxes only)** check box on the Configure Payroll Settings screen, the employee count should be blank for X/Y/Z/V/W records that have reference dates that are not within the date range of the report.

Customers Impacted: This defect affects Costpoint Payroll users.

Workaround Before Fix: None.

Additional Notes: None.

Print Quarterly State Unemployment Report (PRRSTTAX)

- **Defect 839005**

  Description: When you select the **Use Reference Date for X, Y, Z, V and W Records (Applies to Taxes only)** check box on the Configure Payroll Settings screen, the employee count should be blank for X/Y/Z/V/W records that have reference dates that are not within the date range of the report.

  Customers Impacted: This defect affects Costpoint Payroll users.

  Workaround Before Fix: None.

  Additional Notes: None.

Use Reference Date for Record Selection in Print Employee Earnings Report

The Print Employee Earnings Report (PRRERF) screen now supports the option to use the reference dates on checks when selecting **X**, **Y**, **Z**, **V**, and **W** type records. You can enable this option by selecting the **Use Reference Date for X, Y, Z, V and W Records (Applies to Taxes only)** check box on the Configure Payroll Settings screen.

This release is part of Feature 821489: Add Option to Use Reference Date in Payroll. You must have the feature installed and enabled before you can use the functionality included in this particular release.

Prorate Excess Life Coverage, Track Coverage Start Date, and Additional Deduction/Contribution Timing Options

This Costpoint release includes the following features:

- **Prorate Excess Life Coverage** — This feature allows the proration of the cost of insurance coverage that does not span the entire month or the entire open payroll year (based on open pay period).
- **Track Coverage Start Date** — A new **Start Coverage Date** field allows you to track the starting date of the coverage for employee deductions.
- **Additional Deduction/Contribution Timing Options** — These new options allow you to specify when benefit deduction or contribution premiums for the employees in a pay cycle will be processed by payroll. This feature requires a Costpoint Benefits license.

The following screens contain updates to support the features in this release:

- **Compute Payroll (PRPCPR)**

  For Costpoint Benefits users, the application displays a warning message when computing payroll for an open pay period, with the following Deduction/Contribution Timing settings, that has not been processed in the Updated Employee Package Deductions screen:

  - Pay per day and prorate. Deduct before the pay period
  - Pay per day and prorate. Deduct after the pay period
- **Import Employee Leave and Deductions (AOPUTLDL)**

The application populates the new **Coverage Start Date** field when importing EMPL_DED records.

- **Manage Employee Deductions (PRMEDED)**

  A new **Start Coverage Date** field allows you to enter the starting date of the coverage if it is applicable to the deduction.

- **Manage Pay Periods (PRMPRPD)**
  - New **Update Employee Package Deductions-Deduction/Contribution Timing** optionsallow you to specify when the benefit deduction or contribution premiums will be process bypayroll.
  - A new **Employee Package Deductions Processed** check box in the Pay Cycles Schedule subtask indicates whether or not the payperiod was processed through the Update Employee Package Deductions screen.

- **Update Employee Package Deductions (HBPAPDED)**

  When the application updates or creates employee deduction rows, it populates the new **Coverage Start Date** field based on the deduction type.

- **Update Excess Life Deductions (PRPSEXLI)**

  The application now prorates the following:

  Imputed cost for insurance coverage which does not span the entire open Payroll Year (based on open pay period)

  Imputed cost for insurance coverage which does not span the entire month

- **View Deductions (PRQEDED)**

  A new **Coverage Start Date** field displays the starting date of the coverage if it applicable to the deduction.

New Employee Days on Configure Benefit Settings

The Configure Benefit Settings screen contains a new field that allows you to specify the number of days that employees are classified as new employees. This setting will be used for benefit election purposes.

Rename Job Group References in Costpoint People

Prior to this release, the Job Management module in the Administration domain and multiple applications in the People domain use the term “Job Group” in screen names, fields, status text messages, reports, and validations. However, the usage of “Job Group” in the Job Management module and in the People domain are not similar in definition. To avoid confusion, this enhancement renames all “Job Group” and “Job Groups” references in the People domain to “Job Category” and “Job Categories,” respectively.

The Job Group references in following screens were updated for this enhancement:

- Manage Affirmative Action Plans (HAMAPSET)
- Manage Job Categories (HAMJBGRP)
- Print Employee Roster (HAREROST)
- Print Job Category Analysis Report (HARJOBGP)
- Print New Hire Analysis Report (HARNHIRE)
- Print Personnel Action Analysis Report (HARPERS)

- Print Termination Report (HARTERM)
- Print Training Report (HARTRAIN)
- Print Availability/Utilization Report (HARUTIL)
- Approve Position Requisitions (HPMAREQ)
- Manage Job Templates (HPMREQR)
- Manage Functional Job Titles (HSMFUNC)
- Manage Employee Information (LDMEINFO)
- Manage Employee Salary Information (LDMEHIS)
- View Employee Information and History (PRQEHIS)
- Print Data Dictionary (SYRDD)

Employee Self Service Interface Changes

Costpoint Employee Self Service now provides user experience improvements for benefits enrollment through life events or open enrollment. With this release, the Benefits Enrollment screen and Life Events/New Hires screen will use a layout that is similar to ESS in Deltek Time and Expense. Existing tabs are now arranged vertically on the left side of the screen to allow you to quickly view corresponding benefit data. You can now use **Continue** and **Back** buttons for navigating through each tab until you complete the entire benefit enrollment process.

For more details, please refer to the *Costpoint 7.1.1 Employee Self Service Benefits Enrollment* video demonstration which you can view at: https://help.deltek.com/Product/Costpoint/USS/People/BenefitsEnrollment.

In addition to these enhancements, the release also includes the following changes to the tabs on the Benefits Enrollment and Life Events/New Hires screens:

Current Elections (Benefits Enrollment Screen Only)

- The label changed from "New Plan Year" to "New <Pay Period Frequency> Premium" (for example, New Monthly Premium). This column now displays a subtotal amount. The label changed from "Current Plan Year" to "Current <Pay Period Frequency> Premium" (for example, Current Monthly Premium).
- The Query button is no longer available.

Dependents and Beneficiaries

- Remove the links to the Beneficiary subtasks
- The Current Benefits subtask includes the following changes:
  - The subtask name changed from "Current Benefit Coverage" to "Current Benefits."
  - The column name changed from "Module" to "Benefit Type."
- In the Benefit Enrollment Elections/Life Event Elections subtask, the column name changed from "Module" to "Benefit Type."

Dental Insurance, Dependent Life, Medical Insurance, Spouse AD&D, Spouse Life Insurance, and Vision Insurance

- These tabs now have the same functionality and layout.

- A group box displays the current benefits at the top of the screen. This is labeled as: "*(Type of Insurance)* - Current Coverage Level". For example, Vision Insurance - Current Coverage Level.
- A Select New Coverage Level subtask displays all the options for the benefit for the new plan year in a table. You can select only one option from table.
- In applicable tabs, the subtask name changed from "Dependent Information" to "Select Dependents for Coverage." The **Covered** column in this subtask is now labeled "Select."
- In applicable tabs, the subtask name changed from "Spouse Insurance" to "Select Spouse for Coverage." The **Covered** column in this subtask is now labeled "Select."

Employee Life Insurance, Supplemental Life, Long Term Disability, Short Term Disability, AD&D, and Supplemental AD&D

- These tabs now have the same functionality and layout.
- A group box displays the current benefits at the top of the screen. This is labeled as: "*(Type of Insurance)* - Current Coverage Level". For example, Employee Life Insurance - Current Coverage Level.
- A Select New Coverage Level subtask displays a table of all the benefit options for the new plan year. You can select only one option from table.

Medical FSA, Dependent FSA, and Medical HSA

- The column name changed from "Current" to "Current Contribution."
- The column name changed from "New" to 'New Contribution."

Beneficiaries

- The tab name changed from "Designate Beneficiaries" to "Beneficiaries."

Summary (Benefits Enrollment Screen Only)

- A new button, **Confirm**, allows you to authorize your benefit selections. This button performs the same action as clicking the **Default Action** (gears) icon on the global toolbar.
- Elections that you did not select will have a blank **Plan** column and a **Status** column value of **Election Skipped.**

Known Issues

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Benefits Enrollment (ESMBENENROLL)

- **Deltek Defect Tracking Number: 848225**

  Description: The following unexpected error displays if the user attempts to roll over their current Medical HSA election to the new plan year, and they also opt to roll over their Medical FSA: "An HSA may be elected with an FSA only if the FSA is designated as a Limited Purpose FSA."

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

- **Deltek Defect Tracking Number: 852012**

  Description: Error messages will continue to display even after the issue is rectified. These old errors will not prevent you from saving or continuing the process, but these errors also should not display after you fix the issue.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None**.**

  Additional Notes: None.

- **Deltek Defect Tracking Number: 852715**

  Description: On the Dependent Life Insurance tab, if the employee has existing Dependent Life coverage and has not selected new Dependent Life coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Dependent Life Coverage.

- **Deltek Defect Tracking Number: 852716**

  Description: On the Spouse Life tab, if the employee has existing Spouse Life coverage and has not selected new Spouse Life coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Spouse Life Coverage.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 852717**

  Description: On Spouse AD&D Insurance tab, if the employee has existing Spouse AD&D coverage and has not selected new Spouse AD&D coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Spouse AD&D Coverage.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

Direct Deposit (ESMDIRDEP)

- **Deltek Defect Tracking Number: 852070**

  Description: If your screen resolution is low when you open the Direct Deposit tab on the Life Events/New Hires screen, the Current Accounts table may be minimized. You will need to click on the **Restore** button to expand the Current Accounts table.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 854131**

  Description: The application does not allow you to delete all records in the Replacement Accounts table if there is no record in the Current Accounts table.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

Life Events/New Hires (ESMLIFEEVENT)

- **Deltek Defect Tracking Number: 742724**

  Description: When the user is categorized as a Full-Time Equivalent Employee in the Manage Full-Time Equivalent Eligibility screen and a new Life Event record is generated from the ESS Life Events/New Hires screen, the **Full Time Equivalent Employee** check box for the generated record is not selected.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None

- **Deltek Defect Tracking Number: 788990**

  Description: The default Benefit Package is not based on an Employee Type of **Regular**, when a life event is saved for a Part-Time or Temporary employee that:

  - Has a Manage Full-Time Equivalent Eligibility record where **Full-Time Equivalent** value is **Y** and the **Coverage Offer Status** is **Approved**; and
  - Is not linked to a Benefit Package in Manage Employee Benefit Elections.

  Currently, the benefit package is defaulting based on the employee's **Employee Type** from the Manage Employee Salary Information screen.

- **Deltek Defect Tracking Number: 818244**

  Description: The application allows you to select a child for coverage, even though the child's age is greater than the Benefit Plan's Dependent Maximum Age.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 853806**

  Description: On the Medical Insurance tab, if you have a current election for Medical HSA and you selected a new election that is a High Deductible Health Plan (High Ded Plan check box is selected), the following error message displays: “A Health Savings Account (HSA) was previously elected. Only a designated High Deductible Health Plan can be elected with an HSA.” No error message should display in this scenario.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 854133**

Description: On the Direct Deposit tab, the application does not allow you to delete all records in the Replacement Accounts table if there is no record in the Current Accounts table.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

Self Service Configuration (ESMESS)

- **Deltek Defect Tracking Number: 844957**

  Description: The application stops responding if you attempt to open the Life Events subtask link and an existing workflow model has been set up for the application.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

Self Service Status (ESRSELFSERVSTAT)

- **Deltek Defect Tracking Number: 787914**

  Description: The Self Service Status application sends a notification e-mail to an employee regarding Benefits Open Enrollment even if the Notify Employee option is set to **None** in the Workflow Options tab of the Configure Self Service Settings screen.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 854183**

  Description: A system error occurs when previewing the report.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

State Withholding (ESMSTATEWH)

- **Deltek Defect Tracking Number: 850886**

  Description: If the employee does not have a Federal Filing Status or does not have an Employee Tax record in Costpoint, the following error is displays: "You are currently exempt from federal taxes. In order to change your status, please see your Payroll Administrator."

  This message should be an informational message, not an error message. Please note that you will be able to proceed with the life event process even if this error message displays.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

Materials

WA250 Output for Packing Slips

With the advent of iRAPT(Invoicing, Receipt, Acceptance, and Property Transfer) the submission of DD250s now occurs electronically, with limited exceptions. You may either use the government's web application or use an iRAPT-automation system to create and submit electronic data interchange (EDI) transactions. iRAPT is the government's web-based system for accepting, processing, and distributing the DD250.

A specialized iRAPT version of the DD250 (WA250) includes distinctive fields that simplify preparation of iRAPT receiving reports, invoices, and combos.

In view of these changes, Costpoint has been updated and new applications have been added to support the printing of WA250 form as an option for users to print the WA250 when they are unable to use the iRAPT but need to electronically submit the DD250.

These new applications, under the Sales Order Entry module, are the Print WA250 Invoices (OERW250) screen (**Materials » Sales Order Entry » Sales Order Invoices » Print WA250 Invoices**) and the Print WA250 Packing Slips (OERW250P) screen (**Materials » Sales Order Entry » Sales Order Shipping » Print WA250 Packing Slips**).

For this enhancement, new Costpoint screens include the corresponding functions:

Print WA250 Packing Slips (OERW250P)

Use this new screen (**Materials » Sales Order Entry » Sales Order Shipping » Print WA250 Packing Slips**) to print a packing slip for the WA250.

This new screen has the following subtasks:

- Catalog Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of catalogs that you want to print WA250 packing slips for.
- Customer Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of customers that you want to print WA250 packing slips from.
- Invoice Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of packing slips that you want to print.
- Project Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of projects that you want to print WA250 packing slips for.
- Sales Order Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of sales orders that you want to print packing slips for.

Print WA250 Invoices (OERW250)

Use this new screen (**Materials » Sales Order Entry » Sales Order Invoices » Print WA250 Invoices**) to print a report for the WA250.

This new screen has the following subtasks:

- Catalog Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of catalogs that you want to print WA250 invoices for.
- Customer Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of customers that you want to print WA250 invoices from.
- Invoice Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of invoices that you want to print.

- Project Non-Contiguous Ranges – Use this subtask to define on-contiguous ranges of projects that you want to print WA250 invoices for.
- Sales Order Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of sales orders that you want to print invoices for.

Configure Sales Order Entry Settings (OEMSET)

The following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Configure Sales Order Print Options (OEMPOPTS)

The following screen labels have been renamed:

- **Line No on DD250** to **Line No on DD250/WA250**
- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manages Sales Orders (OEMNTS01)

On the Order Details tab, the following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Invoices (OEMINVC1)

On the Print Info tab, the following screen labels have been renamed:

- **Print DD250 Invoice** to **Print DD250/WA250 Invoice**
- **DD250 Invoice Printed** to **DD250/WA250 Invoice Printed**

Manage Sales Order Catalog Defaults (OEMCATLG)

The following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Shipping Transactions (OEMSHIP)

On the Shipping Information tab, the following screen labels have been renamed:

- **DD250 PS Printed** to **DD250/WA250 PS Printed**
- **DD250 PS** to **DD250/WA250 PS**

Print DD250 Invoices (OER250I)

On the Print Options, under Actions tab, the check box has been renamed from **Execute Update DD250 Invoice Printed flag after reports are printed** to **Execute Update DD250 Invoice Printed flag after reports are printed**.

In addition, application logic has been modified so that when you run the **Update DD250/WA250 Printed flag**, the application selects the DD250/WA250 Invoice Printed check box on the Manage Invoices (OEMINVC1)/Manage Invoices Supervisor Screen (OEMINVC2).

Manage Sales Order Project Defaults (OEMPROJ)

The following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Standard Costing

The standard costing feature provides you the ability to use standard costing methods for inventory valuation. Prior to this feature, only the average actual costing method was available in Costpoint. This change was prompted by the changing market where customers are from mixed government and commercial areas.

In this feature, if the project's costing method is equal to standard, Costpoint uses project item standard cost or item standard cost, depending on the project's standard cost valuation option. If this information is unavailable, Costpoint uses zero (0) cost.

Standard costing and the related variances are valuable management tools. If a variance arises, management becomes aware that manufacturing cost has differed from the standard (planned, expected) cost.

This enhancement affects the Administration and Materials domains and features the following:

- New standard costing tables for item standard cost and project item standard cost
- Ability to calculate and post variances for purchase price variance (PPV) and manufacturing costs (materials, labor, misc 1, misc 2, subcontractor) and corresponding overheads
- New application to calculate future standard costs
- New application for PPV
- Modification of existing work in progress (WIP) variance process to include breakdowns for average actual and standard costing

This enhancement also offers the following improvements for average actual costing:

- Update the MO WIP variance calculations to segregate amounts by cost element
- Split WIP variance into multiple buckets for material, labor, subcontract, and overhead variance, and update WIP variance report to display by bucket
- Allow option to post variances for project WIP asset inventory/MOs

Administration

Select a Default Application on the Manage Users (SYMUSR) Screen

The new **Default Application ID** and **Application Name** fields on the **User Interface** tab on the Manage Users (SYMUSR) screen enables the System Administrator to select an application that will automatically display when a user logs in to Costpoint.

Support for Security Assertion Markup Language (SAML) Single Sign-On (SSO)

Framework has been updated so that you can log into Costpoint using SAML SSO through a third-party SAML identity provider, such as Microsoft Azure or Microsoft Active Directory Federation Services (AD FS). The **SAML Single Sign-on** check box has been added to the **Authentication** tab on the **Manage Users (SYMUSR)** screen to enable SAML single sign-on authentication.

View Help About (SYMABOUT)

The Standard Costing feature has been registered in the View Help About (SYMABOUT) screen.

Select a Default Application on the User Preferences (UPMUSRPR) Screen

The new **Default Application** and **Application Name** fields on the User Preferences (UPMUSRPR) screen enables you to select an application that will automatically display when you log in to Costpoint.

Reports & Analytics

Role-Based Dashboards: Usability Enhancements for the Aging Dashparts

Role-based dashboards available in Costpoint are continuously being updated to improve usability and the overall look of the dashboards.

In this release, the enhancements are mainly focused on the aging dashparts of the Project Manager Dashboard, Organization Manager Dashboard, and Finance Manager Dashboard. One of the changes is the splitting of these dashparts into Aging and Current dashparts:

- **AR Aging** — This is now separated into AR Aging and AR Current dashparts. These dashparts display on all three dashboards.
- **Aged Open Billing Detail** — This is now separated into Aged Open Billing Detail and Current Open Billing Detail dashparts. These dashparts display on all three dashboards.
- **AP Aging** — This is now separated into AP Aging and AP Current dashparts. These dashparts display only on the Finance Manager Dashboard.

On the Reports tab, the Current chart displays data for the 0-30 days aging range, while the Aging chart displays data for the other aging buckets (31-60, 61-90, 91-120, and 120+ days). The change was made to resolve the issue of having the Current bucket visually dominating the chart. You can now view your data in all aging buckets more accurately.

There are no changes on the parameters that define the dashparts (that is, the parameter fields on the Parameters tab are the same for the Aging and Current dashparts).

The other cosmetic enhancements applied to the AR, Open Billing Detail, and AP charts include the following:

- "Data Updates Realtime" displays on the charts to indicate that the charts reflect updates to accounts payable (AP) transactions, accounts receivable (AR) invoices and receipts, or billed transactions as they are posted in Costpoint.
- The charts display the X and Y axis titles. Previously, the Y axis displayed just the vendor/project name label, while the X axis displayed the amount without the currency. Now, the Y axis displays either "Vendors" or "Projects" as the axis title, and the X axis displays "US Dollars" along with (000) to reflect that the data is presented in thousands.

Known Issues

Drill-Through Application Not Automatically Loading the Result Set

On the Labor Utilization dashpart of the Organization Manager Dashboard, clicking an employee ID link brings up the Utilization Analysis (COL1,BOL1,POL1) screen. This screen, however, does not automatically load the result set for the selected employee ID link. To display the utilization analysis information on this screen, you must click the Execute icon on the toolbar or press F3.

Incorrect Y Axis Title on AP Charts

On the AP Current and AP Aging charts, “Vendors” is incorrectly displayed as “Projects” on the Y axis. Note, however, that the vendor names are correctly displayed.

Parameters and Reports Tabs Missing on Navigation Toolbar

When accessing a dashboard with another dashboard already opened, the Parameters and Reports tabs may not display on the navigation toolbar when you get back to the previously opened dashboard. Click the Refresh icon to display the tabs again.

Viewing the Online Help

If you use Internet Explorer and the online help does not display correctly, you need to turn off Compatibility View for the browser. Click **Tools » Compatibility View settings**, and clear the **Display intranet sites in Compatibility View** check box. Then refresh the browser. Make sure you remove deltek.com (if listed) from the Websites you have added to Compatibility View list.

Budgeting and Planning

There are no changes to Deltek Budgeting and Planning for this release.

Time & Expense

Time

Timesheet Charge Lookup: Multiple Charge Selection

The Charge Lookup feature in **Time » Timesheets » Manage Timesheets** was enhanced to provide you with the ability to select multiple timesheet charges simultaneously, either when selecting charges from a branch or from Charge Favorites.

Save Default Values for Timesheet Export

A **Save Defaults** button was added to the **Time » Interfaces » Export Timesheets** screen. Click this button to save the current field settings as default values for future use.

A **Reload Defaults** button was also added. Click this button if, having entered new values, you want to revert to the previously saved values.

When you click **Save Defaults**, values entered in the following fields are either saved or not saved as indicated in the following list:

- Basic fields:
  - Saved values include: **Timesheets**, **Subcontractor Export**, and **Costpoint Company**.
  - **Batch ID** and **ADP Filename** are *not* saved.
- **Export Options –** All values in this section are saved.
- **Print Options –** All values in this section are saved.
- **Export to Costpoint Options –** No values in this section are saved.
- **Auto Adjust Options for Regular Timesheets –** All values in this section are saved.
- **Timesheet Generation –** All values in this section are saved.
- **Default Information –** No values in this section are saved.

Manage Timesheets Application Toolbar Improvements

The directional arrows in the Manage Timesheets screen were modified to make them function in the same way they did in earlier versions of Time & Expense.

In Form view, the application opens to the current timesheet by default. Prior to this update, clicking the left arrow displayed the next (future) timesheet period, and clicking the right arrow displayed the previous (earlier) timesheet period. This was opposite of how the arrows functioned in version 9.x.

To simplify navigation between timesheet periods, the following updates were made:

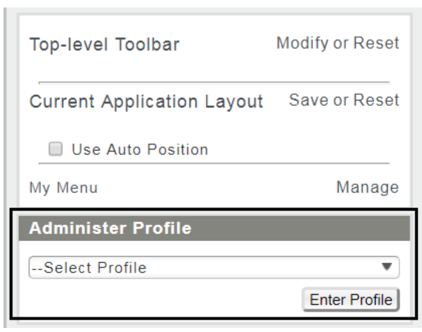
Button	Module
	This button was removed from the application toolbar.
	Clicking this directional arrow displays the timesheet of the previous (earlier) pay period. Prior to this update, clicking this arrow displayed the next timesheet period.

Button	Module
	Click this directional arrow to display the timesheet for the next pay period. Prior to this update, clicking this arrow displayed the last timesheet period.
	This button was removed from the application toolbar.

To further simplify the Manage Timesheets toolbar for end users, a new **Toolbar Controls** option was added to **Options » Show/Hide Screen Controls.** This enables administrators (when logged on using an administrator profile) to remove (hide from view) the Table/Form and Query buttons.

If you have administrator privileges and want to hide application toolbar buttons, complete the following steps:

1. Log on using your administrator profile.
2. Open the Screen Configuration panel by either selecting **Screen Configuration** from the Options menu or by clicking  on the top-right corner of your Costpoint screen.
3. From the Administrator Panel drop-down list, select the user profile that corresponds to the timesheet users for whom you want to hide application toolbar buttons.



4. Click **Enter Profile**.
5. Click **Time » Timesheets » Manage Timesheets**.
6. Click **Options » Show/Hide Screen Controls**.
7. In the Show/Hide Screen Controls screen, select **Toolbar Controls**.

   Note that this option only displays in User Profile mode.
8. In the table, click the **Always Hide** check box next to each toolbar option you want to hide and click **Apply**.

Manage Timesheets Header Interface Simplification

The header area of the **Time » Timesheets » Manage Timesheets** screen was updated to remove fields that display information that employees already know. These include the following fields:

- Revision
- Class
- UDT (01-15) or other configured value (an employee code, for example)

Additionally, the Notes tab was also removed, since it is not used by employees, and the **Sign** button was moved to the lower right-hand area to align with other screen buttons.

Image of screen before update:

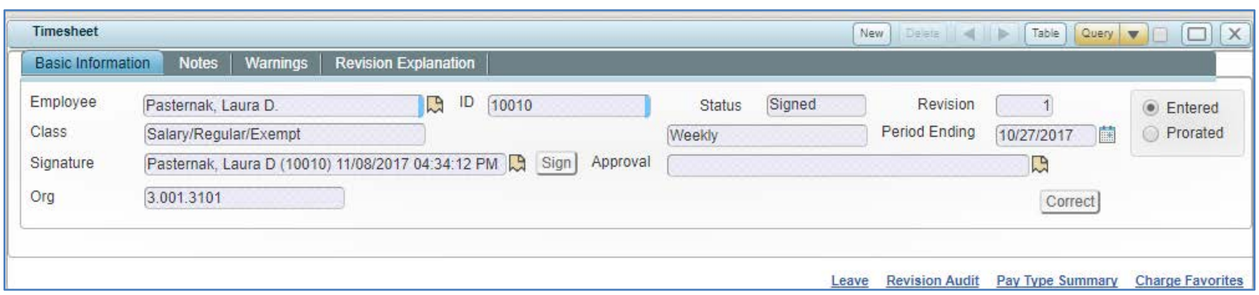
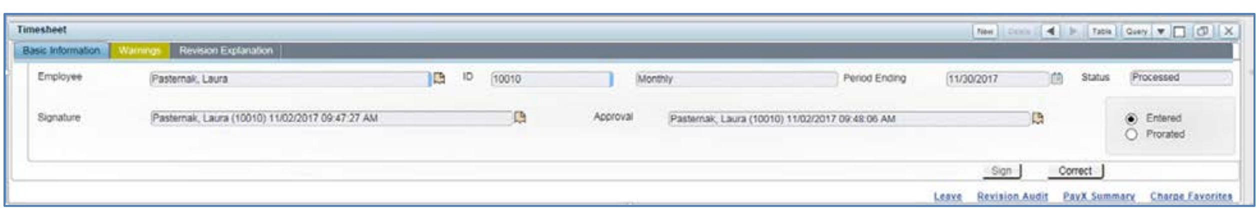


Image of screen after update:



These fields and the Notes tab were *not* removed from **Time » Timesheets » Manage/Approve Timesheets**.

Printing Leave Reports Enabled for Managers

Managers and Supervisors can now print leave reports from the Manage Approve Timesheets application.

Expense

Changes to Subtasks on New Expense Reports

The **Expense Reports » Manage Expense Reports** and the **Expense Reports » Manage/Approve Expense Reports** screens were updated so that the following subtasks no longer display on newly created expense reports, since they are not applicable:

- Advances
- Billable
- Charge Distribution
- Company Paid
- Non-Reimbursable
- Payment
- Revision History
- Workflow

Changes to Subtasks on New Expense Authorizations

The **Expense Authorizations » Manage Expense Authorization** and the **Expense Authorizations » Manage/Approve Expense Authorizations** screens were updated so that the following subtasks no longer display on newly created expense authorizations, since they are not applicable:

- Revision History
- Charge Distribution
- Workflow

Default Attachment Type Added

The attachment type now displays by default in the **Attachment Type** field if only one type is available.

Required Fields Signified by Red Asterisk

Required fields in the Manage Expense Report and Manage Expense Authorization screens are denoted with a red asterisk [*]. Failure to complete these fields results in an error message.

Default Expense Report Type

When only one valid expense report type exists for an expense class, Time & Expense will now default that value into the **Type** field of the expense report and expense authorization forms.

Additionally, note the following:

- If more than one expense report type is available, and a default is not set, Time & Expense will default the first valid expense report type into the **Type** field.

- If no default expense report type exists, and if there are no other valid expense report types, the **Type** field is left blank, and an error message displays.
- If a default expense report type exists for the employee, it is selected as the default option.
- If the selected report type doesn't have any valid expense types, an error message displays on save.

Configuration

Set Default Application

A **Default Application ID** field was added to **Configuration » Resources » Manage Preferences** that enables users to select a default application that will display when they log onto Time and Expense.

Additionally, an **Application Name** field was added that displays the name of the default application you select.

The **Default Application ID** and **Application Name** fields were also added to **Admin » Security » System Security » Manage Users**. Time and Expense administrators can use these fields to select the application that will automatically display when users log onto Time and Expense.

Consolidation of Attachment Workflow Email Notifications

When an employee or supervisor has more than one pending attachment task, the task notifications are now consolidated into a single email message. The message will include a list of expenses for the expense report that requires the attachment, and it will additionally consolidate the expense attachments that are marked as missing.

Export Location Configuration

The Time & Expense export process was enhanced so that configuration of the export location is now managed from the Miscellaneous tab of the **Configuration » General Controls » Configure General Settings** screen. Prior to this update, the export locations were configured from the export applications within Time & Expense.

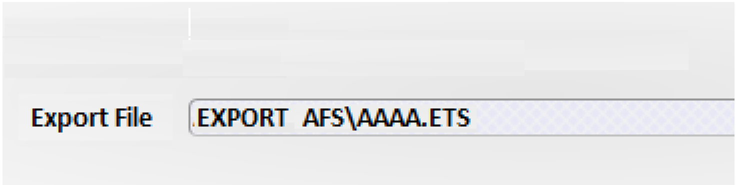
The following modifications were made to the Configure General Settings screen:

- The **Locations** group heading was renamed to **Import/Export Alternate File Locations**
- An **Export Location** field was added.
- The **Trash Location** field was renamed to **Import Trash Location**.

In the following applications, the **File Location** field was renamed to **Export File**:

- Export ERs / Advances
- Export Commitments
- Export Timesheets

It is now a display-only text field, and the export location specified in Configure General Settings appears as a prefix to the file name, as shown in the following example:



Additionally, under **Export Options** in the **Time » Interfaces » Export Timesheets** screen, the **Export to Costpoint** field was renamed to **Export Directly to Costpoint**.

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