Deltek

Deltek Costpoint® 7.1.1

Cumulative Release Notes for July 2019

August 8, 2019

This edition published August 2019.

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 June 2019. 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 in Azure

In Azure portal, the Costpoint application is now available in the Azure Gallery with streamlined instructions for how to add it to your organization portal. When you select Costpoint from the gallery, it enables you to properly configure SAML SSO for both IdP and SdP single sign-on scenarios even with Free/Basic Azure subscriptions. While the previous instructions for registering Costpoint in Azure portal still works, Deltek recommends using this new option going forward.

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

Important Notes

Online Help Improvements

Web Browser

The online help now works with Microsoft Internet Explorer 11.

Online Help Search

The search functionality in the online help has been improved. You can now search for complete phrases in topics and use an AND word search.

To access the search field in help: Click **?** in the upper right corner of any Vantagepoint screen and select **Online Help**.

The search field is in the upper right corner of the help screen.

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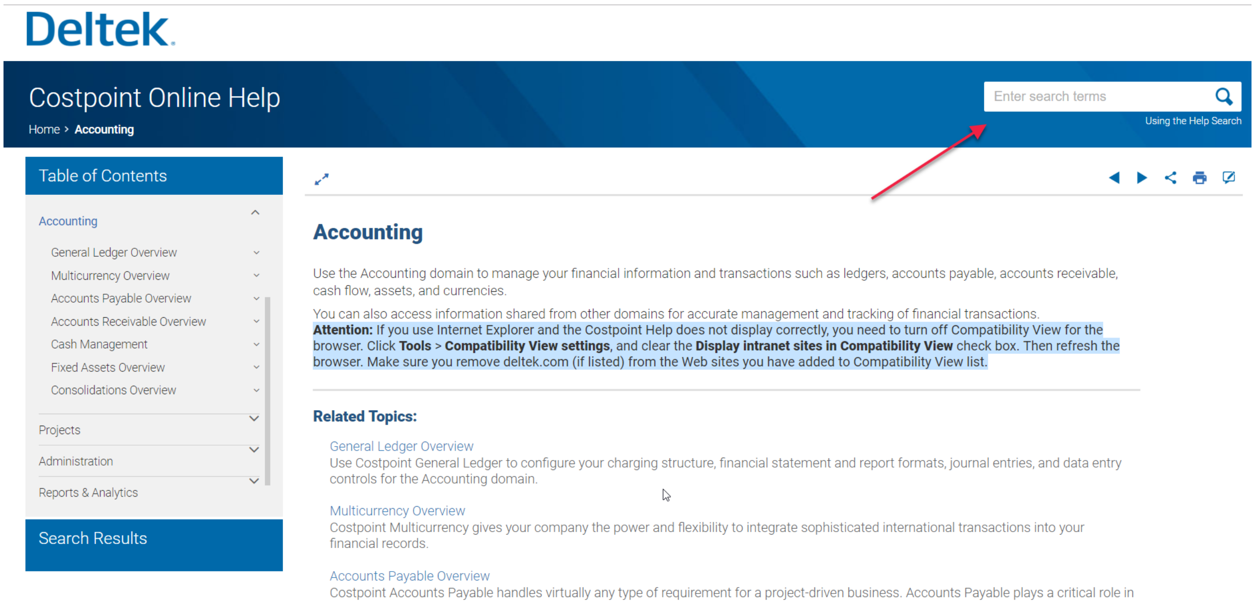
The search functionality in the online help has been improved. You can now search for complete phrases in topics and use an AND word search.

To access the search field in help: Click **Help » Help** on the Costpoint menu or press **SHIFT+F1**.

The search field is on the upper right corner of the help screen.



Note: The new search functionality is available for the online help of all Costpoint modules except for the Materials and People domain.

You can also click the word **Deltek** in the upper left corner of the help screen to open the help home page, which also has a search field.

Searching for Phrases in Topics

Enter phrases in quotation marks in the help search field to return a list of only the topics that contain the complete phrase.

Example:

What you want to search for	Entry in the help search field
All topics that mention the Tax Analysis report	“tax analysis report”

Searching for Multiple Words in Topics (AND Search)

To search for topics that include all the words that you enter in the search field, enter a plus sign (+) between each word. Each topic returned includes all the words that you entered in the search field, regardless of the order of the words or whether the words are adjacent to each other in each topic.

Example:

What you want to search for	Entry in the help search field
All topics that contain both the words “approve” and “invoice”	approve + invoice

Searching for Multiple Words in Topics (OR Search)

When you enter words in the help search field without quotes or plus signs, the search assumes an OR between each word. All the topics that have any or all of the words are returned in the search.

An OR search is helpful when you’re looking for something, but you are not sure of the name or term used in the help.

Example:

What you want to search for	Entry in the help search field
All the topics that contain the word “check” or “payment” or both	check payment

Scope of the Help Search

The search field in online help searches only the help topics. It does not search for content from the Deltek Learning Zone or the Deltek Support Center website.

Other Online Help Improvements

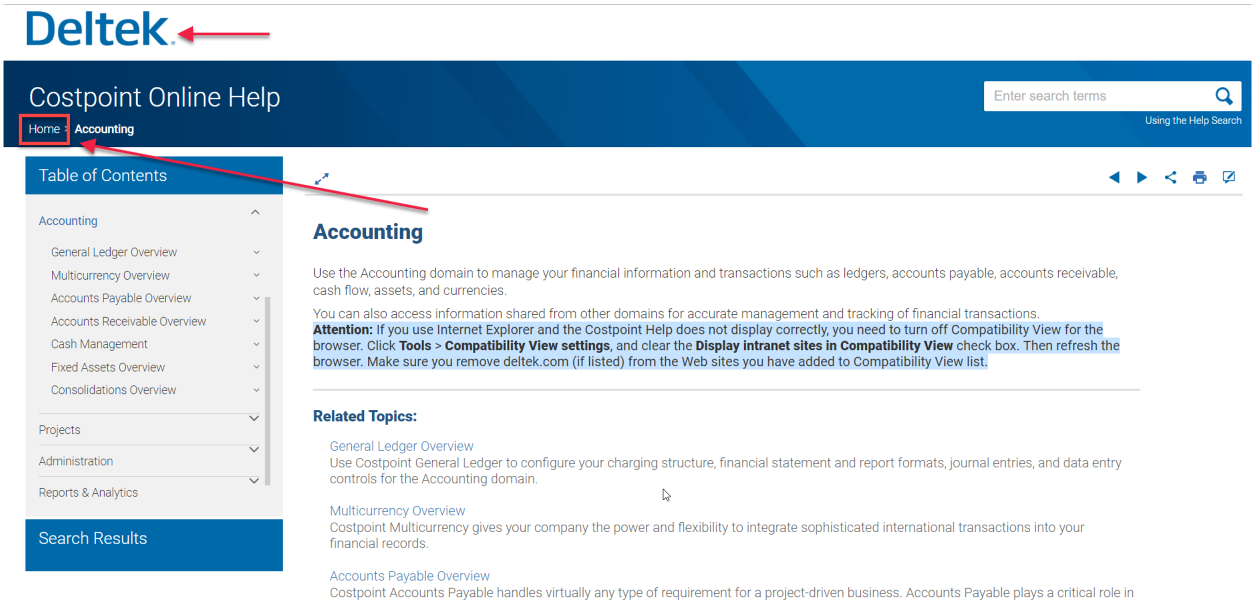
A New Home Page

The home page now has links to the Deltek Learning Zone, the Deltek Support Center website.

How to access the home page:

1. Click **Help » Help** on the Costpoint menu or press **SHIFT+F1**.
2. On the help screen, do either of the following:
   - Click the word **Deltek** in the upper left corner of the screen.

- Click Home in the help navigation breadcrumb path above the Table of Contents.



An Easy Way to Send Feedback to Deltek About Any Help Topic

Open any help topic, and click the new Send Feedback icon in the toolbar above the topic.

In the email that opens automatically, enter comments and suggestions for the specific topic and click Send. The **To** and **Subject** fields in the email are prefilled automatically. The body of the email prefills with the help topic name. We appreciate your constructive feedback to help us continuously improve the online help.

Note: The first time you click , you must select your email application in the How Do You Want to Open This Dialog Box dialog box. Also, select the **Always use this app** check box, so that this dialog box does not display each time you click .

Costpoint

Accounting

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

Contracts

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

Projects

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

People

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

Regulatory and Compliance

2019 Hawaii SUTA Electronic Filing Update

The state of Hawaii launched the New Employer Web Application which employers can use for the following purposes:

- Accessing UI (unemployment insurance) account information such as tax rates and reporting history
- Reporting quarterly wage data and make contribution payments
- Requesting for direct deposit of refunds
- Completing online forms and more

The New Employer Web Application replaces the Hawaii Unemployment Insurance (HUI) Express - Quarterly Wage Reporting System (QWRS) which will be phased out. In line with this change, the Contribution Record Layout using fixed-length format for HUI Express online filing will no longer be valid and the New Employer Web Application will require a CSV file format.

To support the state requirements, the Create Quarterly SUTA Tax File (PRPSMM) application now has the ability to generate a CSV data file format that is valid for Hawaii's New Employer Web Application.

> **Attention:** For more information, see the following references from the State of Hawaii website:
>
> - https://labor.hawaii.gov/ui/main/new-employer-website/
> - https://labor.hawaii.gov/ui/files/2019/02/REVISED-ISP-.pdf

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_030.zip

Materials Management

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

Administration

Disable Auto-Positioning Mode on the New User Interface

To easily view and compare data across subtasks, you now have the option to enable and disable auto-positioning on the new user interface. This option is enabled, by default. To disable the auto-position mode so that you can resize and move the application subtasks on screen, click the User Preferences icon on the toolbar and clear the **Auto Positioning On** check box.

System Requirements

This enhancement requires cp711_sys_055.zip.

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

There are no changes to Costpoint Integration in this release.

Costpoint Planning

New Business Budgeting Enhancements

This document describes enhancements to the New Business Budgeting module, including the following:

- Employee Schedule Subtask
- Multi-New Business Budget Consolidation (Rev/Cost)
- Structured New Business Summary (Rev/Cost)

Employee Schedule Subtask

New Business Budgeting was updated to include the Employee Schedule subtask, which Project Budget Analysts can use to view all the projects to which an employee is currently budgeted, including total scheduled hours and total remaining hours.

To display the employee schedule subtask, go to **Planning » New Business Budgeting » Actions/Processing » New Business Budgets » Hours** subtask

Note that for subcontractor hours and consulting hours only total available hours by period are displayed without the deduction of scheduled hours.

Multi-New Business Budget Consolidation (Rev/Cost)

Multi-Proposal Consolidation (Rev/Cost) (NPT3) was renamed to Multi-New Business Budget Consolidation (Rev/Cost), and it was also updated with additional functionality.

Use this application to specify individual new business budgets to be reported as part of a consolidation project revenue and/or cost report. The report runs a consolidated single report based on the new business budgets that you have selected.

Grouping Description

You can now name the group of New Business Budgets that you have selected and save it for future use.

Enter the group description in the **Grouping Description** field and click **Save Group** to save the group description for future lookup to review the same grouping.

When you return to this application, you can search the group name and select the group. To check, use the lookup in the Grouping Description field to find the Group and click **Select Group** to populate the result set. The result set will display all New Business Budgets but those in the group will be highlighted by row. Additional new business budgets can be selected and added to the Group when you click **Save Group**.

Click **Delete Group** to remove the group from the Grouping Description selection.

All Cost Breakdown Subtask

After you have selected your budgets, click the **All Cost Breakdown** subtask to review the summarized cost categories. You can drill down to find the GL accounts and which New Business Budget the data is coming from. All periods in the budgeted start and end dates are also displayed.

To access the Multi-New Business Budget Consolidation (Rev/Cost) application, go to **Planning » New Business Budgeting » Reports/Inquiries » Multi-New Business Budget Consolidation (Rev/Cost).**

Structured New Business Summary (Rev/Cost)

Structured Proposal Summary (Rev/Cost) NPT4 was renamed to Structured New Business Summary (Rev/Cost), and it was also updated with additional functionality.

Use this application to run a report that displays cost or revenue amounts on individual New Business Budgets within a selected period of performance. All completed budgets regardless of work type whether Proposal, Work Type, or Add On are displayed. Hours and Amounts in the New Business Budgets display in the Structured New Business Budget Summary as amounts.

All Cost Breakdown Subtask

Use the All Cost Breakdown subtask to view summary rows by cost category, description, and total budget with the ability to drill down to the G/L Account and resource.

To access the Structured New Business Summary (Rev/Cost) application, go to **Planning » New Business Budgeting » Reports/Inquiries » Structured New Business Summary (Rev/Cost).**

Requirements:

cp711_bnp_common_022.zip

Resource Planning Enhancements

The **Planning » Resource Planning » Budget Resource Planning** application was enhanced to enable you to:

- Reschedule the start date and end dates of an assignment for a selected resource.
- Reassign budgeted hours from one resource to another resource for an entire period or specific date range.

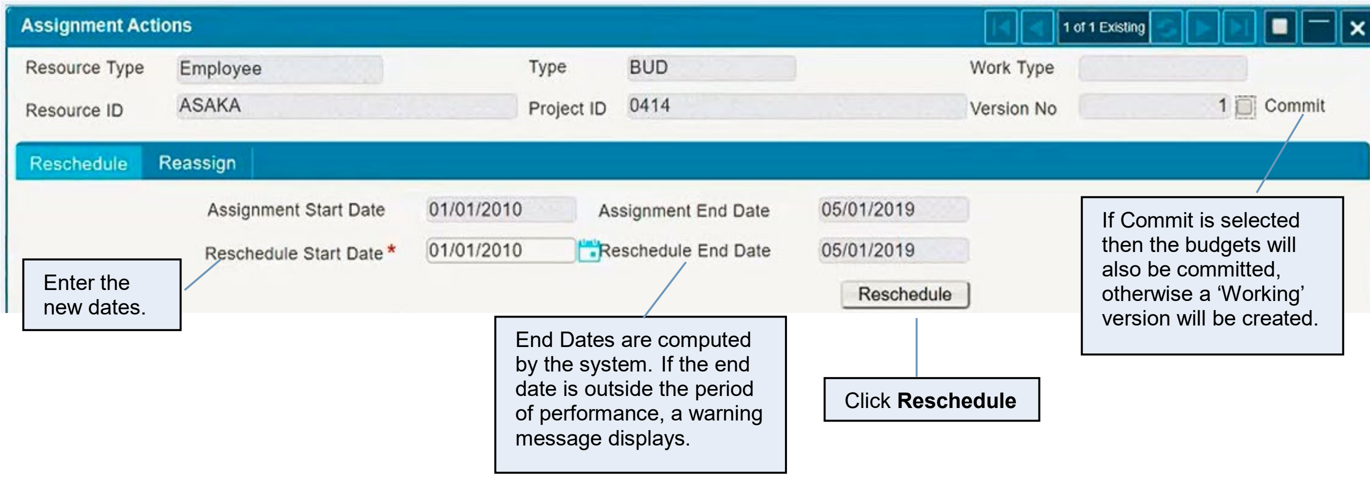
This functionality was implemented through the addition of a new Assignment Actions dialog box, which is accessible after you:

1. Open the resource record in the Budget Resource Planning application.
2. Select the record in the **Selected Resources** table, select the resource.
3. Click **Add/Edit/Delete Assignment**s.
4. Select the row that contains the hours you want to reschedule or reassign.
5. Click **Action** in the **Reassign Reschedule** column.

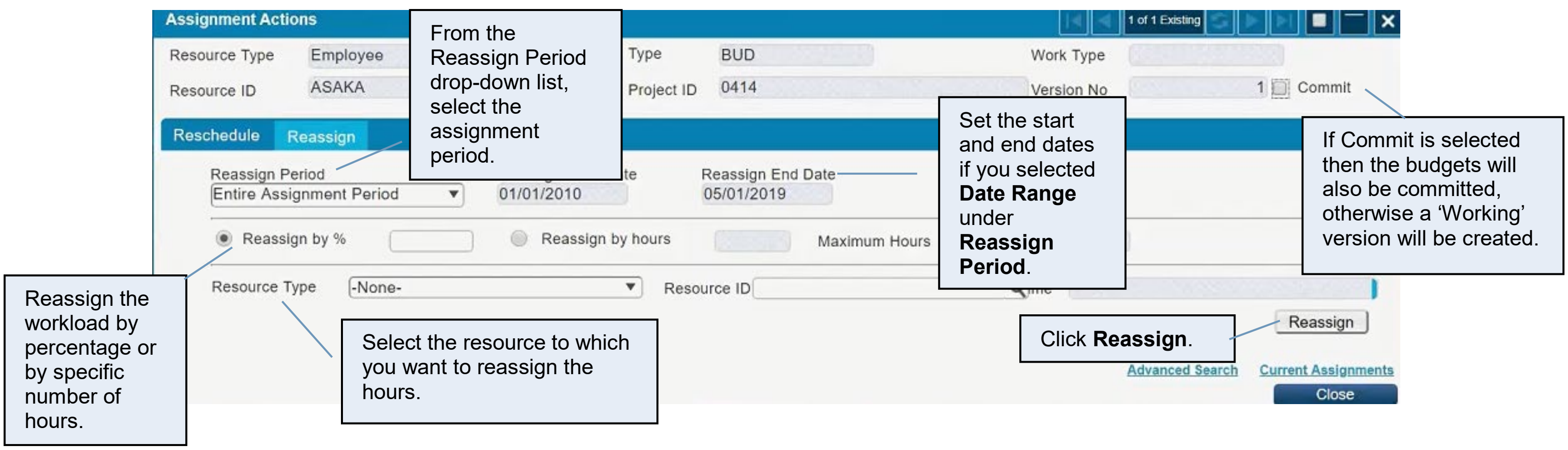
In the Assignment Actions dialog box, use the Reschedule tab to change the assignment dates for the selected resource, and use the Reassign tab to assign the hours to a different resource.

In the Reschedule tab, you can only enter the new dates in the **Reschedule Start Date**. The Reschedule End Date is calculated using the same period of time in the original assignment dates. If you move the reschedule start date a year forward, the reschedule end date will also move a year forward.

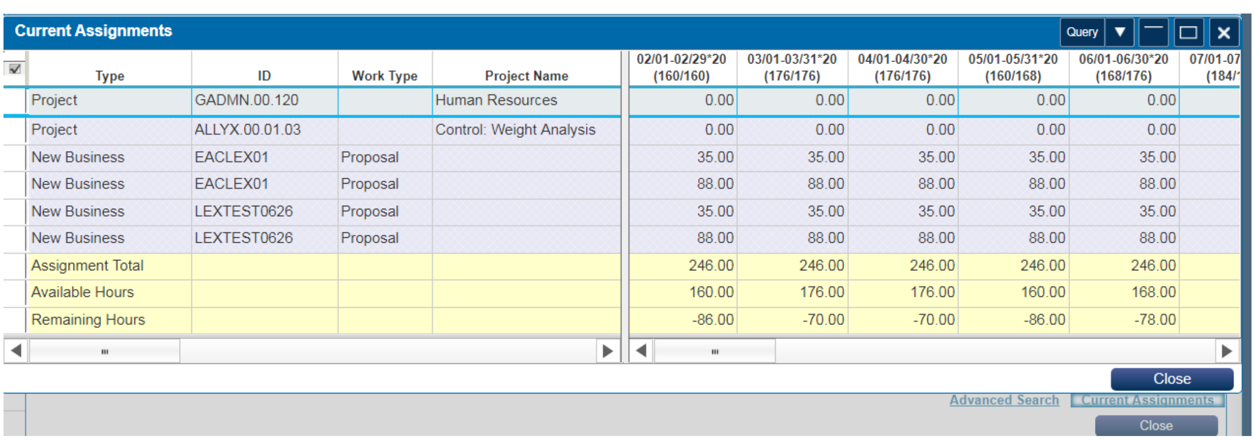
After entering the new dates, click **Reschedule** to change the assignment dates.



Click the Reassign tab to assign the budgeted hours to a different resource. You can only select the same Resource Type as the current selection. If the current assignment is to an Employee, then only Employees can be selected in the **Resource Type**.



To view the existing assignment of the selected resource, click the **Current Assignments** subtask.


Current Assignments

Type	ID	Work Type	Project Name	02/01-02/29*20 (160/160)	03/01-03/31*20 (176/176)	04/01-04/30*20 (176/176)	05/01-05/31*20 (160/168)	06/01-06/30*20 (168/176)	07/01-07 (184/
Project	GADMN.00.120		Human Resources	0.00	0.00	0.00	0.00	0.00	
Project	ALLYX.00.01.03		Control: Weight Analysis	0.00	0.00	0.00	0.00	0.00	
New Business	EACLEX01	Proposal		35.00	35.00	35.00	35.00	35.00	
New Business	EACLEX01	Proposal		88.00	88.00	88.00	88.00	88.00	
New Business	LEXTEST0626	Proposal		35.00	35.00	35.00	35.00	35.00	
New Business	LEXTEST0626	Proposal		88.00	88.00	88.00	88.00	88.00	
Assignment Total				246.00	246.00	246.00	246.00	246.00	
Available Hours				160.00	176.00	176.00	160.00	168.00	
Remaining Hours				-86.00	-70.00	-70.00	-86.00	-78.00	

For more information on the Reschedule/Reassign functionality, see online help for **Planning » Resource Planning » Budget Resource Planning**.

Requirements:

cp711_bnp_common_022.zip

Time and Expense

Time

There are no updates in this area.

Expense

There are no updates in this area.

Configuration

There are no updates in this area.

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