Deltek

Deltek Costpoint® 7.1.1

Cumulative Release Notes for April 2019

May 7, 2019

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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 April 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

Oracle 18x Compatibility

The Costpoint 7.1.1 Installer is updated to be compatible with Oracle 18x.

System Requirements

This enhancement requires the following:

- DeltekCostpoint711ApplicationTier_Build05.2.exe
- DeltekCostpoint711DatabaseTier_Build05.2.exe
- DeltekCostpoint711WebTier_Build05.2.exe

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

New Vendor Classifications

The New Vendor Classifications is a new feature within Costpoint that includes 8(a) and AbilityOne to the list of vendor classifications on several Costpoint applications.

The 8(a) vendor classification includes vendors under the 8(a) Business Development Program business assistance for small businesses that are owned and controlled by socially and economically disadvantaged individuals (usually at least 51% ownership).

The AbilityOne vendor classification includes vendors under the AbilityOne Program. The program uses the purchasing power of the federal government to buy products and services from participating nonprofit agencies that train and employ workers with disabilities.

This feature gives you the ability to track and report on the various business classifications and manage exclusion data that may impact business.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 052 (cp711_sys_052.zip)
- PATCH3637
- PATCH3642
- PATCH3645

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
Accounting	AP	Maintain Vendors	APMVEND	cp711_apmvend_009.zip
Accounting	AP	Approve Vendors	APMVENDA	cp711_apmvenda_002.zip
Accounting	AO	Vendor Master Preprocessor	AOPUTLVU	cp711_aoputlvu_018.zip
Administration	PO	Create Purchase Order Change Orders	POMCHNG	cp711_pomchng_017.zip
Administration	PO	Archive Purchase Orders	POPARCH	cp711_poparch_015.zip

Domain	Module	Application Name	Application ID	Application File
Materials	PO	Manage Purchase Orders	POMMAIN	cp711_pommain_045.zip
Materials	PO	Create Blanket Purchase Order Releases	POMRELS	cp711_pomrels_025.zip
Materials	PO	View Purchase Order Status	POQSTAT	cp711_cmnlib_MMQSTATLIB_003.zip
Materials	PP	Create Purchase Orders	PPPGPO	cp711_pppgpo_024.zip
Materials	PO	Import Purchase Orders	AOPUTLPO	cp711_aoputlpo_029.zip
Contracts	RE	Manage Contract Management Vendor Info	CTMVEND	cp711_ctmvend_009.zip
Contracts	RE	Approve Prospective Vendors	CTMVENDA	cp711_ctmvenda_005.zip

Accounting Domain

This section includes summaries of the changes made in relation with the New Vendor Classifications feature within the Costpoint Accounting domain.

Vendor Master Preprocessor (AOPUTLVU)

This application has been updated to allow the user to import vendor records that include the new business classifications 8(a) Certified and AbilityOne Non-Profit Agency. The GovWin IQ Company ID and Vendor Web Site classifications are also included in the input file validations, although these are not included in the import vendor edit report.

Approve Vendors (APMVENDA)

This application has been updated to provide a warning message when you select for approval a vendor that is on SAM.gov exclusion list. When approving a single vendor, when you select Approved (from Pending or Not Approved), a warning message regarding the exclusion will display. In case of bulk approval, if the user clicks the Approve All button and saves the record, a warning message will also display. The user can click OK and override the warning or click Cancel to make a different selection. Once approved, the vendor header will display a banner noting the basic exclusion information.

> **Note:** The warning message and the relevant user steps will be fully functional when the GovWin IQ vendor interface is made available in a future release.

Manage Vendors (APMVEND)

This application has been updated to provide the user an expanded classification list to assign/save the classification to a regular vendor. The following enhancements have been added to the Manage Vendors application:

- The Business Classifications now include new 8(a) Certified and AbilityOne Non-Profit Agency check box options, and a new NAICS group box has been added under Industry Classification.
- An Exclusion Banner message and a check box have been added to Form and Table views, respectively, to track SAM.gov exclusion information.
  - In Form view, a read-only banner displays when an active SAM.gov exclusion exists.
  - In Table view, a column for Active SAM.gov Exclusion check box has been added. This check box is selected if an active exclusion exists, in which case an Exclusion Banner field displays the information about the exclusion, including the exclusion Type, Active Date, and Termination Date.
- A Vendor Web Site field and a GovWin IQ Company ID field have been added to Form view and their respective columns have been added to the Table views.

The user can also view the classification for regular vendors from the Contract Management Vendor Info application, but the information will be read-only for regular vendors. Also, the user can view read-only classifications on the Subcontract Info tab of the Manage Subcontracts application if the vendor is selected.

> **Note:** In this release, the **Active SAM.gov Exclusion** check box and the **Exclusion Banner** field in Table view are visible on the screen, but currently display no data. These fields and table will be fully functional and populated by a GovWin IQ vendor interface that will be available in a future release.

Contracts Domain

This section includes summaries of the changes made in relation with the New Vendor Classifications feature within the Costpoint Contracts domain.

Manage Contract Management Vendor Info (CTMVEND)

Several changes have been made on the General tab of Manage Contract Management Vendor Info:

- In the Business Classification group box, two new options are now available:
  - 8(a) Certified: Select this check box if the prospective vendor is classified as an 8(a) certified vendor.
  - AbilityOne Non-Profit Agency: Select this check box if the prospective vendor is classified as an AbilityOne nonprofit agency.

Upon approval of the prospective vendor, the values of these two check boxes will be transferred from the CT_VEND table to the VEND table.

- A new field, GovWin IQ Company ID, has also been added to the General tab. Use this field to enter the GovWin IQ company ID associated with the prospective vendor.

This application has also been updated to alert users if the prospective vendor has an active exclusion record in SAM.gov. The exclusion data will come from GovWin IQ and, therefore, may not be a complete representation of exclusions.

- In Form view, a read-only banner displays on the screen when the prospective vendor is on the exclusion list in SAM.gov. The message also includes the type of the exclusion as well as the active and termination dates of the exclusion.
- In Table view, the following new fields display:
  - Active SAM.gov Exclusion: If selected, this check box indicates that the prospective vendor is on the exclusion list in SAM.gov.
  - Exclusion Banner: If the Active SAM.gov Exclusion check box is selected, this field displays information about the exclusion for the prospective vendor, including the exclusion type and active and termination dates.

> **Note:** In this release, the **Active SAM.gov Exclusion** check box and the **Exclusion Banner** field in Table view are visible on the screen but currently display no data. The release also includes the new CT_VEND_EXCLS table that will populate these fields, and this is blank as well. These fields and table will be fully functional and populated by a GovWin IQ vendor interface that will be available in a future release.

Approve Prospective Vendors (CTMVENDA)

This application has been updated to provide a warning message when you select for approval a prospective vendor that has an active exclusion record in SAM.gov. Upon changing the status of a single prospective vendor to Approved or upon saving the record after clicking the Approve All button, Costpoint displays a warning message with the following options:

- **Cancel**: Select this option to go back to the screen and select another prospective vendor to approve.
- **OK**: Select this option to approve the prospective vendor and convert it to a regular vendor. The exclusion data in the CT_VEND table is then transferred to the VEND table for the vendor.

Materials Domain

This section includes summaries of the changes made in relation with the New Vendor Classifications feature within the Costpoint Materials domain.

Manage Purchase Orders (POMMAIN)

Two new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**, have been added to this screen. These new vendor classifications are non-editable on the PO line and default from Accounting/Projects screens.

Create Blanket Purchase Order Releases (POMRELS)

Two new vendor classifications, 8(a) Certified and AbilityOne Non-Profit Agency, have been added to this screen. These new vendor classifications are non-editable, and new release PO line vendor classification defaults from the current value.

Create Purchase Order Change Orders (POMCHNG)

This application now copies the new vendor classifications to the corresponding columns when a new change order is created.

Archive Purchase Orders (POPARCH)

This application now copies the new vendor classifications information to the corresponding columns when archiving a purchase order (PO).

View Purchase Order Status (POQSTAT)

This application now displays the new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**.

Create Purchase Orders (PPPGPO)

The value of the new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**, is retrieved from the vendor master for new PO lines (new POs and existing PO/Release) and new release for an existing blanket order.

Import Purchase Orders (AOPUTLPO)

The value of the new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**, is retrieved from the vendor master and defaults to the corresponding columns.

Contracts

New Vendor Classifications

See details in the Accounting section for the new vendor classification fields.

Projects

Update in Post IWO Journal to Assign Correct PLC Description in the Receiving Company

The Post IWO Journal application has been updated to assign the correct project labor category (PLC) description to the transaction in the receiving company so that the documentation on the bill is correct. This application now populates the Open Billing Detail table in the receiving company with the receiving company's description for the PLC included in the transaction.

This enhancement requires cp711_iwppost_012.zip.

New Application Menu Items for Automating Multiple Processes

The Costpoint menu has been updated with new applications for an upcoming feature that will automate multiple processes. The design is meant for companies that run the processes for small amounts of data. If you have questions on whether you should use this function, contact Deltek Support Center. The new applications include:

- Compute Revenue Processes (PJPREVP)
- Cost Pool Processes (PJPPOOLP)

- Month End Processes (PJPMENDP)
- Reporting Processes (PJPREPTP)

System Requirement

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 052 (cp711_sys_052.zip)

People

Accrue Paid Leave During Employee's Family Medical Leave

In accordance with Family Medical Leave Act (FMLA) regulations, Costpoint now provides employers with the ability to enable the accrual of paid leave for employees with a **Family Medical Leave** status.

This enhancement allows employers to comply with section 825.209(h) of the FMLA, which states that "An employee's entitlement to benefits other than group health benefits during a period of FMLA leave (e.g., holiday pay) is to be determined by the employer's established policy for providing such benefits when the employee is on other forms of leave (paid or unpaid, as appropriate)."

Application Updates

To support this feature, this release includes the following updates to corresponding applications:

Leave Types (LDMLVTP)

The screen now provides an **Accrue during Family Medical Leave** check box. When leave is computed, employees with a status of **Family Medical Leave** in the Manage Employee Information screen are automatically excluded from processing. If your company policy specifies that employees must continue to accrue this particular type of leave while an employee is on Family Medical Leave Act (FMLA) leave, select this check box to include the leave type in the Compute Leave process.

If you leave the check box unchecked and the employee has a status of **Family Medical Leave** in the Manage Employee Information screen, then the leave type will not be included in the Compute Leave processing.

> **Note:** If the leave accrual is based on the number of hours worked by the employee and the employee does not work any eligible hours in the leave period, then the employee would not receive an accrual.
>
> If your leave type is set up to apply a ceiling on the employee's anniversary date, that ceiling will be applied for an employee on FMLA leave whether or not this check box is selected. If the check box is selected, the employee's accrual will be processed and the ceiling will be applied. If this check box is not selected, the employee will not receive an accrual, but the ceiling will still be applied.

This check box is not available if the Use to track Family Medical Leave check box is selected.

Compute Leave Accruals (LDPCLHF)

The application will now process the leave types that are set to **Accrue during Family Medical Leave** for employees with a status of **Family Medical Leave**.

Print Data Dictionary Report (SYRDD)

The application now provides information for the new Accrue during Paid Family Leave Flag (Y/N) (ACCRUE_DURING_FML_FL) column on the Leave Type (LV_TYPE) table.

System Requirements

This enhancement requires Costpoint 7.1.1 PATCH3647.

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	Leave	LDMLVTP	Manage Leave Types	cp711_ldmlvtp_008.zip
People	Leave	LDPCLHF	Compute Leave Accruals	cp711_ldpclhf_023.zip

Regulatory and Compliance

Q1 2019 SUTA Electronic Filing Update

This Costpoint release provides the ability to create the SUTA electronic files of the States of Indiana and Montana. This also includes updates to support the 2019 SUTA tax file specifications of multiple states.

To comply with latest state requirements, the following Costpoint screens were updated in this release:

- ☐ Create Quarterly SUTA File (PRPSMM)
- ☐ Manage Employee Taxes (PRMETAX) (Deployed separately to DSM on 3/12/2019)
- ☐ Manage SUTA Tax File Data (PRMSMM)

SUTA Tax Electronic Filing Updates

Indiana

The State of Indiana now requires employers to file quarterly reports electronically. To support this requirement, this release includes the following updates:

- **Manage SUTA Tax File Data** — You can now set up the SUTA tax file data for Indiana on this screen. You must complete the setup on this screen before you can generate a SUTA file for Indiana.
- **Manage Employee Taxes** — Indiana requires each reported employee's Standard Occupation Classification Code in the SUTA electronic file. The label for the Occupational / SOC Code field on the Manage Employee Taxes has been updated to include "Indiana." Before generating the quarterly SUTA electronic file for Indiana, you must assign the appropriate Standard Occupation Classification Code to each applicable employee.
- **Create Quarterly SUTA File** — You can now create Indiana's ICESA-format SUTA file.

Montana

The State of Montana now requires employers to file quarterly reports electronically. To support this requirement, this release includes the following updates:

- **Manage SUTA Tax File Data** — You can now set up the SUTA tax file data for Montana on this screen. You must complete the setup on this screen before you can generate a SUTA file for Montana.
- **Create Quarterly SUTA File** — You can now create Montana's ICESA-format SUTA file. As part of the Montana requirements, the EAF Rate field on the Create Quarterly SUTA Tax File screen is now applicable for the state.

Oregon

The State of Oregon updated the SUTA file specifications with the following changes:

- FEIN and BIN (Business Identification Number) are now required in RE record.
- Address fields in RS record were removed.

The Create Quarterly SUTA File now supports the latest Oregon EFW2 format for SUTA electronic filing.

New York

Effective with the Form NYS-45, Quarterly Combined Withholding, Wage Reporting, and Unemployment Insurance Return, for the first quarter of 2019, due April 30, employers must report for each quarter each employee's gross wages, unemployment-taxable wages, and income tax withheld. The State of New York updated the SUTA file specifications with the following changes:

- **Record '1W'** – Fields 60-73 (Federal gross wages subject to withholding during the quarter): This field was previously used to report annual gross wages subject to withholding and was only reported in the 4th quarter. New York updated their specifications to indicate that this field must be reported every quarter and populated with the total of federal gross wages or other payments subject to withholding, prior to any allocation, paid to every individual employed at any time during the calendar quarter.
- **Record '1W'** – Fields 75-88 (Total Tax Withheld during the quarter): This field was previously used to report annual state income tax withheld and was only reported in the 4th quarter. New York updated their specifications to indicate that this field must be reported every quarter and populated with the total amount of New York State, New York City, and Yonkers tax withheld for every individual employed at any time during the quarter.
- **Record '1T'** – Fields 60-73: This field was previously used to report annual gross wages subject to withholding from all 1W records in the file and was only reported in the 4th quarter. New York updated their specifications to indicate that this field must be reported every quarter and populated with the total annual gross wages subject to withholding from all 1W records in the file.
- **Record '1W'** – Fields 75-88: This field was previously used to report annual state income tax withheld from all 1W records in the file and was only reported in the 4th quarter. New York updated their specifications to indicate that this field must be reported every quarter and populated with the total tax withheld from all 1W records in the file.

Known Issue

No S Record in the Indiana SUTA File

Deltek Defect Tracking Number: 1099296

Description: The SUTA File for Indiana does not contain the **S** Record when the **Labor Location** field is blank in the salary details of the employee.

Customers Impacted: This defect affects Costpoint Payroll users who create SUTA files for the State of Indiana.

Workaround Before Fix: Ensure that employees with **IN** (Indiana) as the **SUTA State** have labor location values in their salary details. You can enter the employee's labor location in the Manage Employee Salary Information screen or in the Salary Details subtask of the Manage Employee Information screen.

Additional Notes: None.

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	Employee	PRMETAX	Manage Employee Taxes	cp711_cmnlib_LDMEINFOLIB_012.zip *(Released separately to DSM on 3/12/2019)*
People	Payroll	PRMSMM	Manage SUTA Tax File Data	cp711_prmsmm_008.zip
People	Payroll	PRPSMM	Create Quarterly SUTA Tax File	cp711_prpsmm_027.zip

Materials Management

NAICS Code

Changes were made in preparation for the future implementation of an enhancement related to the North American Industry Classification System (NAICS) Code.

> **Note:** These enhancements have no impact on current functionality. The functionalities of these updates/enhancements are not available until the full feature is released.

System Requirements

This enhancement requires:

- PATCH3629
- PATCH3637
- PATCH3640
- PATCH3646

New Vendor Classifications

See details in the Accounting section for the new vendor classification fields.

Administration

New Vendor Classifications

See details in the Accounting section for the new vendor classification fields.

New Application Menu Items for Automating Database Refresh Process and ODBC Access

The Admin > System Administration menu is updated with new applications for future enhancements to manage ODBC Account setup and maintenance and database refresh requests for Cloud customers. The new menu items are:

- Manage Cloud ODBC Accounts (SCMODBC)
- Manage Cloud Database Refresh Requests (SCMDBREF)

System Requirements

This enhancement requires cp711_sys_052.zip.

Simplified Sharepoint Content Management Integration Setup

Select the new **Use Automatic Sharepoint Configuration** check box in the **Manage Content Types (SYMCMICT)** application to automatically set up Sharepoint for Content Management Integration, based on recommended best practices.

The Use Automatic Sharepoint Configuration check box is enabled if Sharepoint is the chosen CMS.

If you use this setup option, Costpoint has full administrative control over the associated Sharepoint site to create document libraries, content types, and columns. Repository, Content type, Base Folder, and Attachment Property fields become disabled.

After you save the automatic configuration, Costpoint populates the fields with references to automatically created objects in Sharepoint:

- The newly created Sharepoint library name is titled “Costpoint Library” with the Content Type ID appended to it.
- The Sharepoint Content Type is titled Costpoint Type with the ID appended to it.
- The Attached in Costpoint property is automatically created and assigned to the screen.
- The Base folder is set as root (/). The system assumes that subfolders will not be used in Sharepoint.

System Requirements

This enhancement requires the following:

- PATCH7170
- cp711_symcmict_007.zip
- cp711_sys_052.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.

Planning

Project Budgeting and New Business Budgets

Burden Template Functionality Added to Planning

For this release, Costpoint Planning was enhanced to include the Manage Burden Templates and Import Pools to Burden Templates applications from Advanced Project Budgeting in Costpoint. These applications enable you to create new or import cost pools from Costpoint to use for calculating burden for a budget or EAC.

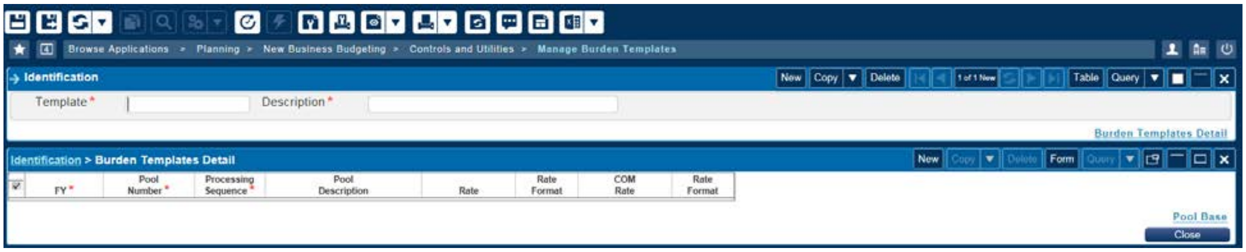
Previously, the pool setup from Costpoint was used by default and only one burden template was available per budget. Now, the current Fiscal Year Pools from Costpoint can still be used by choosing the 'Default' template but there is an option to use a different Burden Template. Also, different Burden Templates can be used for different Budget or EAC Versions or on different Project Budget nodes.

The Manage Burden Templates and Import Pools to Burden Templates applications were added to the following areas of the Planning module:

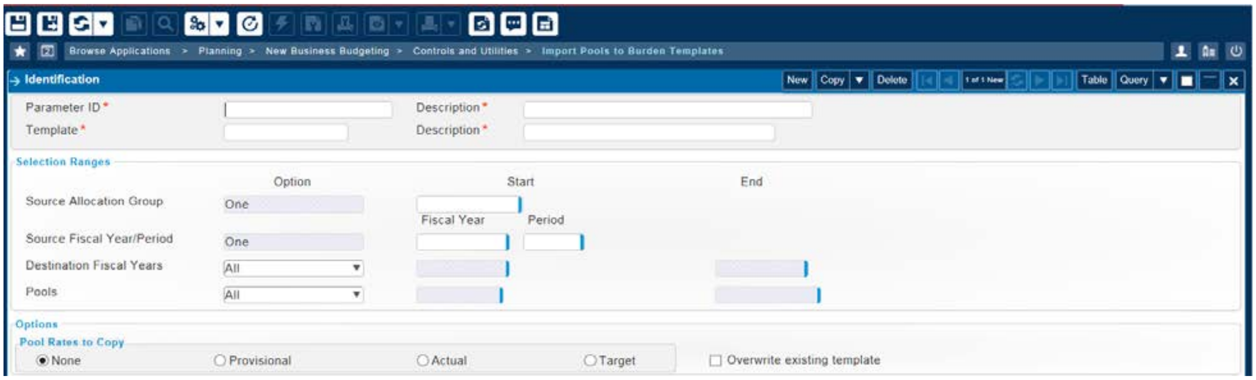
- Project Budgeting » Controls and Utilities » Project Budget Burden Template Controls
- New Business Budgeting » Controls and Utilities » New Business Budget Burden Template Controls

Note that no screens were recreated. The burden template functionality was already existing in Costpoint Advanced Project Budgeting but is now available in Planning.

Use the Manage Burden Templates application to manually set up different templates. To create the Pool Base, you can manually set up the Accounts and Orgs, or use Wildcarding. You can also Import Pool Base from an existing Costpoint Allocation Group, Fiscal Year and Pool.



The Import Pools to Burden Template application allows the Pools to be imported from Costpoint Pools. Once the templates exist, they can be edited in Manage Burden Templates.

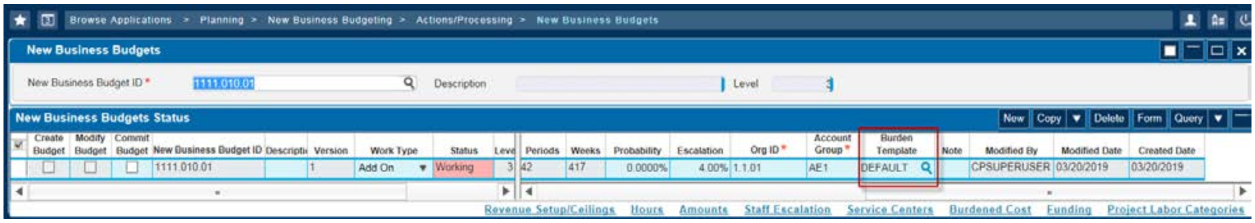


Refer to the online help for more information on how to use these applications.

Apply a Burden Template to a Budget

To enable you to apply a burden template to a budget, a Burden Template column was added to the Status table in both Project Budgets/EACs and New Business Budgeting.

Note that the Burden Template column is only enabled for budgets that have a status of **Working**.



The Burden Template lookup allows you to select which template to use on budgets. You can use DEFAULT template which uses the **Current FY Pool Configuration** or select from existing burden templates including the ones that you setup in Manage Burden Templates application.

When you save or commit the Budget/EAC, the burden will be calculated using the selected template in the Burden Template column if the fiscal year of that template is equal to or greater than the current fiscal year. If the selected template has records with less than the current fiscal year then the DEFAULT template will be used in calculation even if a different burden template was selected.

To check the fiscal year, go to **Planning » Administration » Administration Controls » Maintain Current Period**.

For example, if the Current Fiscal Year is 2016, any burden template selected with records dated 2016 and above will be used in calculation but if the selected template has records 2015 or earlier then the DEFAULT template will be used to calculate burden.

Administration

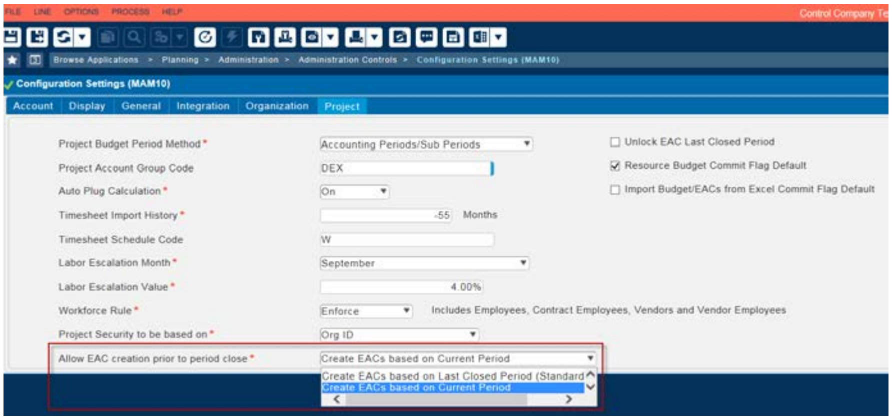
Update to Configurations Settings (MAM10)

The Configuration Settings (MAM10) was enhanced and the configuration setting **"Allow EAC creation prior to period close"** is now included.

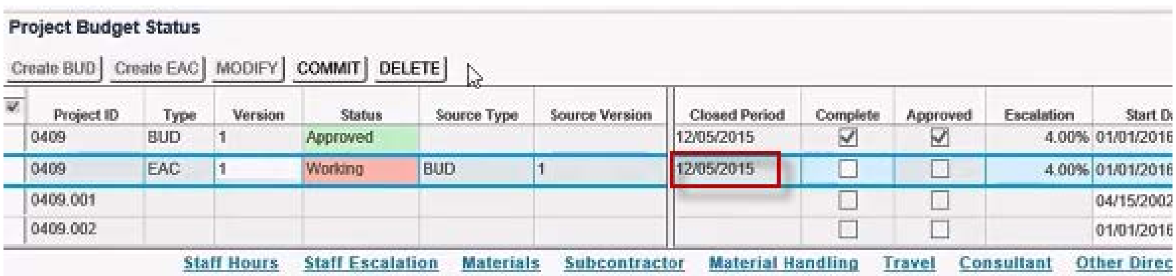
Users can now select from the following options:

- Create EACs based on Last Closed Period (Standard Function)
- Create EACs based on Current Period

To select these options, go to **Planning » Administration » Administration Controls » Configuration Settings (MAM10) » Project** Tab



Currently, the system defaults to **Create EACs based on Last Closed Period (Standard Function)**. This means that when you create an EAC, the date will be based on the maximum End Date from Maintain Fiscal Periods (MAM8,MAM9) and less than the current FY/PD (Maintain Current Period).

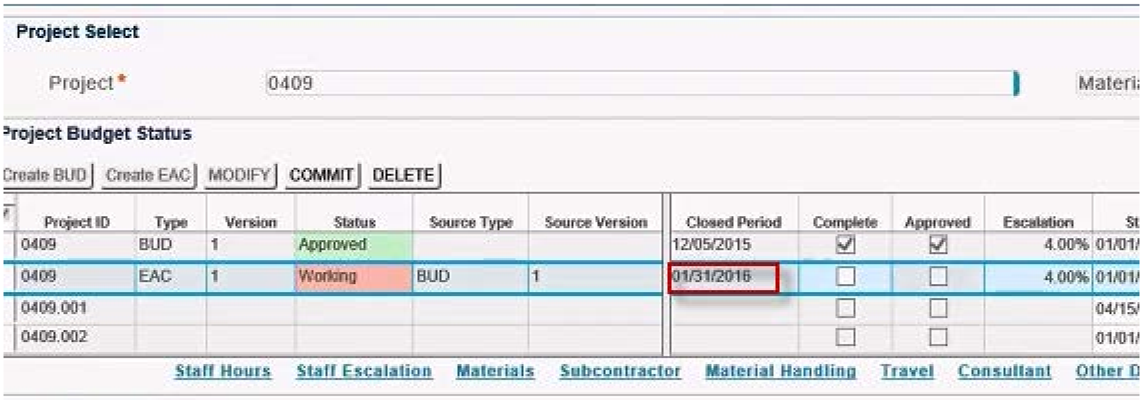


When you select **Create EACs based on Current Period**, the end date that will be used when you create an EAC is the current period as specified as the **End Date** in Maintain Current Period application.

For Example:

1. Go to Configuration Settings (MAM10) » Project Tab.
2. In the **Allow EAC creation prior to period close** drop-down menu, select **Create EACs based on Current Period.**
3. Click .
4. Go to **Project Budgets/EACs** » click **Create EAC**.

The Closed Period date displayed will be the End Date in Maintain Current Period application.



You do not need to Refresh the application for the changes in configuration to take effect.

Also, when the **Create EACs based on Current Period** is selected the EAC created from an Approved Budget will bring in Actual transactions in the Current Planning Period and replace the Current Period Budget.

If there are no Actual transactions, the Budget numbers will be removed in the Current Period.

Requirements

cp711_bnp_common_019.zip

Time and Expense

Time

Request Correction Button Hidden

The Request Correction button on processed timesheets in closed periods will now be hidden if the associated workflow events are not enabled.

Requirements
This update requires the following file: cp711_te_tmmtimesheet_026.zip.

Expense

There are no updates in this area.

Configuration

There are no updates in this area.

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