Deltek Costpoint HotFix Readme

Release Date: December 29, 2016

Role-Based Dashboards

Costpoint now delivers dashboard content for specific roles through a new module (Dashboards) which is available in the Reports & Analytics domain. This allows you to view information you rely on most, displayed either in chart or table format, without having to navigate to individual modules or reports.

A role-based dashboard has two tabs: Parameters and Reports. You configure your dashboard through the Parameters tab, while you use the Reports tab to view the dashparts that are selected with the configured parameters.

Each dashboard has several dashparts. The dashparts can pull data from Costpoint, Budgeting & Planning, or Time & Expense. If you are not licensed for Budgeting & Planning or Time & Expense, the dashparts that rely on information from these applications will not display on the dashboard.

Within the dashboards, you can perform the following actions:

- Set up which dashparts to display and in what order.
- Limit the number of records you want to display for some dashparts.
- Drill down from the dashpart to a screen in Costpoint, Budgeting & Planning, or Time & Expense (depending on your security rights).
- Access shortcut links to Costpoint Enterprise Reporting (CER) and Costpoint Analytics (if access is configured by your system administrator).

Because dashboard content depends on role-based security, each dashboard is customized to display information specific to a role.

Costpoint's Role-Based Dashboards enhancements will be released in multiple phases. For this release, the Project Manager Dashboard is included.

Project Manager Dashboard (PJDPM)

If you are a project manager, you can use this dashboard to view high-level information of your projects' financial status, including outstanding accounts receivables, open billing details, and revenue. You can also use this to review invoices and work assignments for approval.

The following dashparts are available on this dashboard:

- **AR Aging** — This is a stacked bar chart that displays the outstanding billed accounts receivables (AR) by project for a given aging range. When you hover over a bar segment on this chart, a tooltip displays the actual AR amount for that segment/project. When you click a segment, Costpoint opens the View Receivables and Collections screen, where you can view the outstanding invoices for that specific segment/project.
- **Aged Open Billing Detail** — This is a stacked bar chart that displays the sum of transactions that have not been billed yet by project for a given aging range. When you hover over a bar segment on this chart, a tooltip displays the actual open billing amount for that segment/project. When you click a segment, Costpoint opens the Manage Open Billing Detail screen, where you can view the open billing transactions for that particular segment/project.
- **Projects Approaching Funding** — This is a horizontal bar chart that enables you to view the projects with revenue that is approaching a % threshold of the funded value of the contract. You can set the % threshold on the Parameters tab. When you hover over a bar segment on this chart, a tooltip displays the revenue value, funded value, and backlog for that segment/project. When you click a segment, Costpoint opens the

Manage Modifications screen, where you can view not only funding modifications but also modifications to the signed value for that segment/project.

- **My Links** — This displays the list of links that are set up in your **My Menu**, so you have easy navigation to your most used areas in Costpoint.
- **Work Assignments for Approval** — This is a numerical table that displays the work assignments lined up for approval and their corresponding charge amounts. When you click a work assignment ID link, Costpoint opens the Approve Work Assignments screen, where you can view and approve that work assignment and/or the charge lines linked to it. Only work assignments and charge lines with a status of **Pending** or **None** are included in the table. Those with a status of **Approved**, **Closed**, **Rejected**, or **Hold** are not displayed.

  This dashpart displays only if you are licensed for the Subcontractor Management module. This does not display by default. You have to manually enable this dashpart on the Parameters tab, or your system administrator can set it up to display automatically on your dashboard.
- **Standard Bills for Approval** — This is a numerical table that displays the standard bills for approval and their corresponding invoice amounts. When you click a project ID link, Costpoint opens the Manage Standard Bills screen, where you can view the standard bill. Only standard bills with a status of **Unselected** are included in the table.
- **Milestone Invoices for Approval** — This is a numerical table that displays the milestone bills for approval and their corresponding invoice amounts. When you click a project ID link, Costpoint opens the Manage Milestone Percent Complete Bills screen, where you can view the milestone bill. Only milestone bills with a status of **Unselected** are included in the table.
- **Pending Expenses** — This is a numerical table that displays your projects' labor and expense amounts that have not yet been posted, as well as the inception-to-date actual amount with pending added. When you click a project name link, the system opens the Project Status (SPA5) screen for that project in Budgeting & Planning, where you can run the Project Status Report.

  This dashpart displays only if you are licensed for Budgeting & Planning. This does not display by default. You have to manually enable this dashpart on the Parameters tab, or your system administrator can set it up to display automatically on your dashboard.

System JAR, Application JAR, and Other Requirements

This enhancement requires the following files:

- cp711_sys_024.jar
- cp711_pjdpm_001.jar
- sessionactuateapiejb.jar
- DeltekCostpoint711FrameworkUpdate024.exe

More information about this release is on the following page.

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 Customer Care at http://support.deltek.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 Customer Care Connect 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 Customer Care Connect 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).

More Information:

If you have any questions, please contact Deltek Customer Care at https://support.deltek.com.