Deltek

Deltek Costpoint Hot Fix Readme

Release Date: April 29, 2019

Subcontractor Plan Enhancements

This feature allows you to track subcontractor requirements that are identified as part of the request for proposal (RFP) or contract. You can identify the status of the subcontractor plan, the date of submission of the plan, and the required percentage of work that needs to be allotted to it. In addition, you will be able to track the socioeconomic status needed to meet the requirements of the plan and also the North American Industry Classification System (NAICS) codes associated with the plan.

The Manage Opportunities and Manage Contracts screens have been updated for this enhancement.

Screen Updates

Manage Opportunities (CTMOPP)

Changes have been made to the RFP Info tab of the Manage Opportunities screen:

- The **Subcontract Plan Submitted** check box has been removed from the **Provisions** group box.

  > **Note:** If any of your records had this check box selected, upon installing this update, Costpoint automatically sets the **Subcontractor Plan** drop-down list to **Submitted** in the **Subcontractor Plan** group box for the affected records.

- A new group box, **Subcontractor Plan**, has been added to this tab with the following fields:
  - **Subcontractor Plan:** Select the subcontractor plan status. Valid values are **Submitted**, **Approved**, **Waiver Granted**, and **Not Applicable**.
  - **Date Submitted:** Enter or select the date the subcontractor plan was submitted.
  - **General Small Business:** Select this check box if the subcontractor plan does not specify the socioeconomic status type of business required or if the subcontractor requirements specified in the RFP are identified as general small business.
  - **Required:** Enter the total percentage of business that subcontractors need to perform.
  - **Allocation Total:** This field displays the sum of the **Percentage** values assigned to the socioeconomic statuses that exist on the new Subcontractor Plan subtask added to Manage Opportunities. You can use this field to track if the allocated work is meeting the required percentage of work that subcontractors need to perform.

A new Subcontractor Plan subtask is now also available on this screen. This subtask displays only on the RFP Info tab.

Use the Subcontractor Plan subtask to further break down the subcontractor requirements and track additional details about the subcontractor plan, such as the socioeconomic statuses and NAICS codes associated with the plan. You can manually enter a row in the table window by clicking **New**, or load all predefined socioeconomic statuses by clicking **Load All Socioeconomic Status**. The table window consists of the following fields:

- **Load All Socioeconomic Status:** Click this button to load all predefined socioeconomic status labels in the table window.
- **Check box:** On the left of the table window, select the check box corresponding to the socioeconomic status that will be used on the subcontractor plan. You can select multiple check boxes.
- **Socioeconomic Status:** For manually entered rows, enter or select the socioeconomic status that will be used on the subcontractor plan. If you click **Load All Socioeconomic Status**, this field automatically displays the socioeconomic status.
- **Percentage:** This field is enabled only if you select the check box of the corresponding socioeconomic status. Enter the percentage of work required for each socioeconomic status. Costpoint sums all values in the **Percentage** column and displays the sum in the **Allocation Total** field on the RFP Info tab. You can use the **Allocation Total** field to determine if the allocated work is meeting the percentage of work required for the subcontractors.
- **NAICS:** This field is enabled only if you select the check box of the corresponding socioeconomic status. Enter or select the primary NAICS code associated with the socioeconomic status.

> **Note:** For both manually entered and automatically loaded rows, once you save the record, you will not be able to delete these rows. Only new rows that have not been saved can be deleted on the subtask.

Manage Contracts (CTMCNTR)

The following changes have been made on the Manage Contracts screen:

- On the Contract Info tab, the **Is the Subcontract Plan submitted?** drop-down list has been removed.

  > **Note:** If any of your records had a value of **Yes** in this field, upon installing this update, Costpoint automatically sets the **Subcontractor Plan** drop-down list to **Submitted** in the **Subcontractor Plan** group box for the affected records.

- A new **Subcontractor Plan** group box and a new Subcontractor Plan subtask have been added to the Classification tab of this screen. These have similar fields and options as their counterparts on the Manage Opportunities screen.

  If the main opportunity linked to the contract is a Costpoint opportunity (that is, the **Costpoint Opportunity** check box is selected for the contract record in Manage Contracts), the field values on the new group box and subtask on the Manage Contracts screen default from the Manage Opportunities screen, but can be edited. Note, however, that if you have already saved values on the Manage Contracts screen before linking a Costpoint opportunity to the contract, the system does not overwrite the initially saved values in Manage Contracts.

System Requirements

This enhancement requires the following:

- PATCH3636
- Common library - CTLIB (cp711_cmnlib_CTLIB_014.zip)

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_015.zip
Contracts	Opportunities	CTMOPP	Manage Opportunities	cp711_ctmopp_014.zip

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 Support Center at https://deltek.custhelp.com before you install the update.

To Download the Hot Fix/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 Hot Fix/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 Hot Fix 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.

Appendix: For Additional Information

Deltek Support Center

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

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

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

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

Access Deltek Support Center

To access the Deltek Support Center:

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

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

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