

Deltek Costpoint HotFix Readme

Release Date: December 27, 2017

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.

System JAR Requirement

These enhancements require the following:

- Costpoint 7.1.1 System JAR 036 (cp711_sys_036.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.

Domain	Module	Application ID	Application Name	Application File
Reports & Analytics	Dashboards	PJDPM	Project Manager Dashboard	cp711_pjdpm_003.zip
Reports & Analytics	Dashboards	PJDOM	Organization Manager Dashboard	cp711_pjdom_002.zip

Reports & Analytics	Dashboards	DBDFM	Finance Manager Dashboard	cp711_dbdfm_002.zip
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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.

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 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).

More Information:

If you have any questions, please contact Deltek Support Center at <https://deltek.custhelp.com>.