

Deltak Costpoint HotFix Readme

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Team Management Module

The new Costpoint Team Management module allows managers to view employee information as well as compensation and benefit statements of their direct and indirect reports. With the implementation of this enhancement, Human Resources (HR) administrators and managers will be able to perform the following:

- **HR Administrator**
 - Assign a “Manager” role to multiple people at the same time.
 - Identify the fields that managers can view about their employees.
 - Assign managers access to view employee personal information.
 - Assign managers access to view employee address/phone information.
 - Assign managers access to view the payroll and benefits menu for their employees.
 - View the total compensation statement for an employee.
- **Manager**
 - View the compensation and benefits information of direct reports; and of their direct reports (if multiple levels exist under the manager).
 - View the listing of all direct reports.



You must have a Costpoint Human Resources license to be able to access Costpoint Team Management.

Costpoint Team Management Screens

You can access the Costpoint Team Management module and its applications by going to **People Domain » Team Management » My Team**, and then open the applications from the following menus:



Security for the Costpoint Team Management is at application level similar to other Costpoint modules. Administrators can create user groups and then restrict the modules/applications by group.

Labor suppression can be enabled to any salary information on the Team Details screen. However, Labor Suppression will not work on the Total Compensation and Benefits screen. Administrators must block users that should not see salary information from the Total Compensation and Benefits screen.

Overview

- **Team Details (HTMDETAIL)** — Managers use this screen to view employee and salary information of their direct/indirect reports. The information from this screen loads from tables used by the Manage Employee Information screen.
- **Leave (HTMLEAVE)** — Managers use this screen to view leave information of their direct/indirect reports. The information on this screen loads from the data on the Leave subtask of the Manage Employee Information screen.
- **Knowledge (HTMKNOWLEDGE)** — Managers use this screen to view the employee education, courses, skills, training, and/or professional organization information of their direct/indirect reports.
- **Company Property (HTMPROPERTY)** — Managers use this screen to view the list of company

property assigned to their direct/indirect reports.

- **Security**
 - **Government Documents (HTMGOVDOCUMENTS)** — Managers use this screen to view the International Traffic in Arms Regulations (ITAR) status and information of their direct/indirect reports.
 - **Citizenship (HTMCITIZENSHIP)** — Managers use this screen to view the list of countries that their direct/indirect reports have an affiliation.
- **Contact Information**
 - **Phone/Email (HTMPHONE)** — Managers use this screen to view the phone or email contact information of their direct/indirect reports.
 - **Emergency/Contact (HTMEMERGENCYCONTACT)** — Managers use this screen to view the primary and/or secondary emergency contact information of their direct/indirect reports.
 - **Address (HTMADDRESS)** — Managers use this screen to view address information of their direct/indirect reports. The information on this screen loads from the Address Contact tab and the Additional Addresses subtask of the Manage Employee Information screen.
- **Human Resources**
 - **Life Events (HTMLIFEEVENTS)** — Managers use this screen to view the life events of their direct/indirect reports.
 - **Total Compensation and Benefits (HTMTOTALCOMP)** — Managers use this screen to view the compensation and benefits statement for their direct/indirect reports.
- **Report**
 - **Team Information Report (HTRTEAMINFO)** — Managers use this screen print a report that displays the information on the Team Details screen.

Updated Costpoint Screens

The following existing screens in Costpoint were updated for this enhancement:

- **Configure Personnel Settings (HPMSET)** — The screen contains new Costpoint Team Management options that allow managers to view the information either of only their direct reports; or both their direct and indirect reports.
- **Manage Employee Information (LDMEINFO)** — The subtask name changed from “Employee Country Status” to “Citizenship.”
- **Manage Employee Security (EMMUSITAR)** — The previous “Manage Employee U.S. and ITAR Data” screen is now the “Manage Employee Security” screen.
- **Set Up Company (SYPCOMP)** — The Company defaults include the new **Team Management view reports method** field from the Configure Personnel Settings screen.
- **View About Costpoint (SYMABOUT)** — The Features subtask now displays the installation information for the Team Management feature.

System JAR and Patch Requirements

These enhancements require the following Costpoint 7.1.1 releases:

- System JAR 029 (cp711_sys_029.zip)
- PATCH3176
- PATCH5089

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application File
Adminis- tration	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_013.zip
People	Employee	EMMUSITAR	Manage Employee Security	cp711_emmusitar_001.zip
People	Personnel	HPMSET	Configure Personnel Settings	cp711_hpmset_002.zip
People	Team Management	HTMDETAIL	Team Details	cp711_htmdetail_001.zip
People	Team Management	HTMGOVDOC UMENTS	Government Documents	cp711_htmgovdocuments_001.zip
People	Team Management	HTMLEAVE	Leave	cp711_htmleave_001.zip
People	Team Management	HTMKNOWLED GE	Knowledge	cp711_htmknowledge_001.zip
People	Team Management	HTMPROPERT Y	Company Property	cp711_htmproperty_001.zip
People	Team Management	HTMKNOWLED GE	Knowledge	cp711_htmknowledge_001.zip
People	Team Management	HTMCITIZENS HIP	Citizenship	cp711_htmcitizenship_001.zip
People	Team Management	HTMPHONE	Phone/Email	cp711_htmphone_001.zip
People	Team Management	HTMEMERGEN CYCONTACT	Emergency/Conta ct	cp711_htmemergencycontact_001.zip
People	Team Management	HTMADDRESS	Address	cp711_htmaddress_001.zip
People	Team Management	HTMLIFEEVEN TS	Life Events	cp711_htmlifeevents_001.zip
People	Team Management	HTMTOTALCO MP	Total Compensation and Benefits	cp711_htmtotalcomp_001.zip
People	Team Management	HTRTEAMINFO	Team Information Report	cp711_htrteaminfo_001.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 Customer Care at <http://support.deltek.com> before you install the update.

To Download the HotFix 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 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>.