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Deltek Costpoint® 7.1.1

Cumulative Release Notes for May 2017

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Overview

This document is a compilation of the release notes distributed for the enhancements that are part of system jar 029. This document also includes release notes for enhancements made in relation with application jars, libraries, and regulatory updates since the last system jar release.

Deltek Costpoint HotFix Readme

My Approval Tasks (WFATODO)

You can now view the details of the approval tasks assigned to you and access the applications where you need to complete the approval tasks or steps through the new My Approval Tasks screen. Only steps that you have not completed yet are displayed on this screen. You can access My Approval Tasks even if you have no approval tasks due or if you are not associated with any approval role, but no records will be displayed on this screen.

This application displays only approval workflow tasks associated with new workflow models created using the Approval Workflow Models screen (**Administration » Workflow » Approval Workflow (NEW) » Approval Workflow Models**). It does not display any tasks related to old workflows.

The My Approval Tasks table window displays information on your outstanding approval steps and details on the approval workflow associated with those steps. These include, but are not limited to, the approval screen, task and workflow start time, the role and escalate role permitted to complete the approval step, and the time allotted for the completion of the approval step.

Another table window displays the screen field information of the approval screen associated with the approval step selected in the My Approval Tasks table window.

You can access this screen through **Reports & Analytics » Dashboards » Approval Workflow » My Approval Tasks**.

System and Application JAR Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 029 (cp711_sys_029.zip)
- cp711_wfatodo_001.zip

OEMENTSO Library

The OEMENTSO library contains common business logic which is shared by the following applications:

- Manage Sales Orders (OEMNTSO1)
- Manage Sales Orders Supervisor Screen (OEMNTSO2)

System Jar Requirements

The Costpoint 7.1.1 system jar file, cp711_sys_029.zip, is required for this update.

OEMINVC Library

The OEMINVC library contains common business logic which is shared by the following applications:

- Manage Invoices (OEMINVC1)
- Manage Invoices Supervisor Screen (OEMINVC2)

System Jar Requirements

The Costpoint 7.1.1 system jar file, cp711_sys_029.zip, is required for this update.

OEMISSU Library

The OEMISSU library contains common business logic which is shared by the following applications:

- Manage Sales Order Inventory Issues (OEMISSU1)
- Manage Sales Order Non-Inventory Issues (OEMISSU2)

System Jar Requirements

The Costpoint 7.1.1 system jar file, cp711_sys_029.zip, is required for this update.

Reporting Controls for Costpoint Team Management

As part of the future release of the Costpoint Team Management module (Manager Self Service), this enhancement adds new options on the Configure Personal Settings screen for allowing managers to view personnel-related information of either their direct reports only; or both their direct and indirect reports on Costpoint Team Management screens. Full functionality of this enhancement will be available with the release Costpoint Team Management module and its applications.

This release includes enhancements to the following Costpoint screens:

Configure Personnel Settings (HPMSET)

New Team Management options allow you to select if managers will have the ability to view the records of only their direct reports or both their direct and indirect reports on Costpoint Team Management screens.

Setup Company (SYPCOMP)

A new field, **Team Management view reports method** (S_TM_MTHD_CD), was added to the Personal Admin Settings (H_PER_ADM_SETTINGS) table. The field stores the **Team Management** option selected on the Configure Personnel Settings screen.

Patches and System JAR requirements

These enhancements require the following Costpoint 7.1.1 releases:

- System JAR 029 (cp711_sys_029.zip)
- PATCH3176

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
People	Personnel	HPMSET	Configure Personnel Settings	cp711_hpmset_002.zip
Administration	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_013.zip

New Options to Create Reversal in the Next Regular Period or Adjustment Period

The **Reverse in Adjustment Period** check box is now available where you can indicate that the reversal can be applied in an adjustment period, provided that you enter the specific adjustment period on screen.

The information about the specific period can be entered in the Reversing subtask of the Manage Journal Entries (GLMJE) application.

Application Jar Requirement

Domain	Application Name	Application ID	Application JAR
Accounting	Manage Journal Entries	GLMJE	cp711_glmje_015.zip

In addition, the cp711_sys_026.zip jar file is required for this update.

Sales Group Abbreviation Cost of Goods Sold Account Split

Changes were made to these applications in preparation for the future implementation of a new feature.

These enhancements have no impact on current functionality.

The functionalities of these updates/enhancements are not available until the full feature is released.

This feature enables you to break the clearing and cost of goods sold general ledger entries by cost element: Materials, Labor, Subcontract, Misc 1, and Misc 2. These are loaded costs including overhead.

In addition, this feature provides you with the visibility of actual costs by cost element through cost of goods sold and enables you to compare project budgets to actual costs with more granularity and accuracy.

These screens display Acct/Org by Cost Element Info:

- Manage Sales Orders (OEMNTSO1)
- Manage Sales Orders Supervisor Screen (OEMNTSO2)
- Approve Sales Orders (OEMAPPSO)

- Configure Sales Order Entry Settings (OEMSET)
- Manage Sales Group Abbreviations (PDMSALES)
- View Sales Order Status Information (OEQSTAT)
- View Sales Analysis Information (OEQSALES)

Manage Sales Group Abbreviations (PDMSALES) screen has been updated to add a new option to allow users to charge to specific accounts and organization IDs by cost element for the **Cost of Sales Account** and **Clearing Account** transaction types.

Manage Sales Order Inventory Issues (OEMISSU1) screen has a new tab, Cost Elements, to allow users to split the cost by elements.

Set Up Company (SYPCOMP) screen has been updated to copy the value of the new check box, **Post Cost of Sales by Cost Element,** added to the Configure Sales Order Entry Settings screen when creating a new company by copying an existing company.

This feature is only applicable for and an option to those who use sales group abbreviation for sales orders

PATCH3161 and PATCH3187 are required for these updates.

Search and Sort Job Templates by Detail Job Title and Description

Prior to this release, the Manage Job Templates screen only allowed you to search records by the **Job Template ID** field. This release enhances the Query functionality on the screen by adding the ability to search job template records and sort results by the **Detail Job Title** and **Detail Job Title Description** fields.

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
People	Employee	HPMREQR	Manage Job Templates	cp711_hpmreqr_009.zip

Set Up Company (SYPCOMP)

Set Up Company has been updated in preparation for the future implementation of a new feature.

This enhancement has no impact on current functionality.

The functionalities of updates/enhancements for this new feature are not available until the full feature is released.

Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 029 (cp711_sys_029.zip)

- PATCH3170
- cp711_sypcomp_013.zip

Reset Starting Paycheck and Payment Advice Numbers

When printing checks/payment advices for the same pay cycle one-by-one, the check/advice number was not being updated appropriately. For example, if you printed check 73 for employee XXXX, then printed a check for employee YYYY, the starting check number was not incremented. To address this issue, you now have the option to update the starting check number if necessary. For this functionality, the Print Paychecks (PRPPCHK) and the Print Payment Advices (PRPPPAF) screens now contain a new **Refresh** button that updates starting check/advice number.

Patch Requirements

These enhancements require Costpoint 7.1.1 PATCH3174.

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
People	Payroll	PRPPCHK	Print Paychecks	cp711_prppchk_011.zip
People	Payroll	PRPPPAF	Print Payment Advices	cp711_prpppaf_008.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/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)

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