



Deltek

Deltek Costpoint®

New Vendor Classifications
Release Notes

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Overview

Welcome to Deltek Costpoint 7.1.1 Release Notes. These release notes contain a summary of new enhancements available in this release:

The New Vendor Classifications is a new feature within Costpoint that includes 8(a) and AbilityOne to the list of vendor classifications on several Costpoint applications.

The 8(a) vendor classification includes vendors under the 8(a) Business Development Program business assistance for small businesses that are owned and controlled by socially and economically disadvantaged individuals (usually at least 51% ownership).

The AbilityOne vendor classification includes vendors under the AbilityOne Program. The program uses the purchasing power of the federal government to buy products and services from participating nonprofit agencies that train and employ workers with disabilities.

This feature gives you the ability to track and report on the various business classifications and manage exclusion data that may impact business.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 052 (cp711_sys_052.zip)
- PATCH3637
- PATCH3642
- PATCH3645

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 Name	Application ID	Application File
Materials	PO	Manage Purchase Orders	POMMAIN	cp711_pommain_045.zip
Materials	PO	Create Blanket Purchase Order Releases	POMRELS	cp711_pomrels_025.zip
Administration	PO	Create Purchase Order Change Orders	POMCHNG	cp711_pomchng_017.zip
Administration	PO	Archive Purchase Orders	POPARCH	cp711_poparch_015.zip

Overview

Domain	Module	Application Name	Application ID	Application File
Materials	PO	View Purchase Order Status	POQSTAT	cp711_cmplib_MMQSTATLIB_003.zip
Materials	PP	Create Purchase Orders	PPPGPO	cp711_pppgpo_024.zip
Materials	PO	Import Purchase Orders	AOPUTLPO	cp711_aoputlpo_029.zip
Contracts	RE	Manage Contract Management Vendor Info	CTMVEND	cp711_ctmvend_009.zip
Contracts	RE	Approve Prospective Vendors	CTMVENDA	cp711_ctmvenda_005.zip
Accounting	AP	Maintain Vendors	APMVEND	cp711_apmvend_009.zip
Accounting	AP	Approve Vendors	APMVENDA	cp711_apmvenda_002.zip
Accounting	AO	Vendor Master Preprocessor	AOPUTLVU	cp711_aoputlvu_018.zip

Accounting Domain

This section includes summaries of the changes made in relation with the New Vendor Classifications feature within the Costpoint Accounting domain.

Vendor Master Preprocessor (AOPUTLVU)

This application has been updated to allow the user to import vendor records that include the new business classifications **8(a) Certified** and **AbilityOne Non-Profit Agency**. The **GovWin IQ Company ID** and **Vendor Web Site** classifications are also included in the input file validations, although these are not included in the import vendor edit report.

Approve Vendors (APMVENDA)

This application has been updated to provide a warning message when you select for approval a vendor that is on SAM.gov exclusion list. When approving a single vendor, when you select **Approved** (from **Pending** or **Not Approved**), a warning message regarding the exclusion will display. In case of bulk approval, if the user clicks the **Approve All** button and saves the record, a warning message will also display. The user can click **OK** and override the warning or click **Cancel** to make a different selection. Once approved, the vendor header will display a banner noting the basic exclusion information.

Note: The warning message and the relevant user steps will be fully functional when the GovWin IQ vendor interface is made available in a future release.

Manage Vendors (APMVEND)

This application has been updated to provide the user an expanded classification list to assign/save the classification to a regular vendor. The following enhancements have been added to the Manage Vendors application:

- The Business Classifications now include new **8(a) Certified** and **AbilityOne Non-Profit Agency** check box options, and a new NAICS group box has been added under Industry Classification.
- An Exclusion Banner message and a check box have been added to Form and Table views, respectively, to track SAM.gov exclusion information.
 - In Form view, a read-only banner displays when an active SAM.gov exclusion exists.
 - In Table view, a column for **Active SAM.gov Exclusion** check box has been added. This check box is selected if an active exclusion exists, in which case an **Exclusion Banner** field displays the information about the exclusion, including the exclusion Type, Active Date, and Termination Date.
- A **Vendor Web Site** field and a **GovWin IQ Company ID** field have been added to Form view and their respective columns have been added to the Table views.

The user can also view the classification for regular vendors from the Contract Management Vendor Info application, but the information will be read-only for regular vendors. Also, the user can view read-only classifications on the Subcontract Info tab of the Manage Subcontracts application if the vendor is selected.

Note: In this release, the **Active SAM.gov Exclusion** check box and the **Exclusion Banner** field in Table view are visible on the screen, but currently display no data. These fields and table will be fully functional and populated by a GovWin IQ vendor interface that will be available in a future release.

Contracts Domain

This section includes summaries of the changes made in relation with the New Vendor Classifications feature within the Costpoint Contracts domain.

Manage Contract Management Vendor Info (CTMVEND)

Several changes have been made on the General tab of Manage Contract Management Vendor Info:

- In the **Business Classification** group box, two new options are now available:
 - **8(a) Certified**: Select this check box if the prospective vendor is classified as an 8(a) certified vendor.
 - **AbilityOne Non-Profit Agency**: Select this check box if the prospective vendor is classified as an AbilityOne nonprofit agency.

Upon approval of the prospective vendor, the values of these two check boxes will be transferred from the CT_VEND table to the VEND table.

- A new field, **GovWin IQ Company ID**, has also been added to the General tab. Use this field to enter the GovWin IQ company ID associated with the prospective vendor.

This application has also been updated to alert users if the prospective vendor has an active exclusion record in SAM.gov. The exclusion data will come from GovWin IQ and, therefore, may not be a complete representation of exclusions.

- In Form view, a read-only banner displays on the screen when the prospective vendor is on the exclusion list in SAM.gov. The message also includes the type of the exclusion as well as the active and termination dates of the exclusion.
- In Table view, the following new fields display:
 - **Active SAM.gov Exclusion**: If selected, this check box indicates that the prospective vendor is on the exclusion list in SAM.gov.
 - **Exclusion Banner**: If the **Active SAM.gov Exclusion** check box is selected, this field displays information about the exclusion for the prospective vendor, including the exclusion type and active and termination dates.

Note: In this release, the **Active SAM.gov Exclusion** check box and the **Exclusion Banner** field in Table view are visible on the screen but currently display no data. The release also includes the new CT_VEND_EXCLS table that will populate these fields, and this is blank as well. These fields and table will be fully functional and populated by a GovWin IQ vendor interface that will be available in a future release.

Approve Prospective Vendors (CTMVENDA)

This application has been updated to provide a warning message when you select for approval a prospective vendor that has an active exclusion record in SAM.gov. Upon changing the status of a single prospective vendor to **Approved** or upon saving the record after clicking the **Approve All** button, Costpoint displays a warning message with the following options:

- **Cancel**: Select this option to go back to the screen and select another prospective vendor to approve.

- **OK:** Select this option to approve the prospective vendor and convert it to a regular vendor. The exclusion data in the CT_VEND table is then transferred to the VEND table for the vendor.

Materials Domain

This section includes summaries of the changes made in relation with the New Vendor Classifications feature within the Costpoint Materials domain.

Manage Purchase Orders (POMMAIN)

Two new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**, have been added to this screen. These new vendor classifications are non-editable on the PO line and default from Accounting/Projects screens.

Create Blanket Purchase Order Releases (POMRELS)

Two new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**, have been added to this screen. These new vendor classifications are non-editable, and new release PO line vendor classification defaults from the current value.

Create Purchase Order Change Orders (POMCHNG)

This application now copies the new vendor classifications to the corresponding columns when a new change order is created.

Archive Purchase Orders (POPARCH)

This application now copies the new vendor classifications information to the corresponding columns when archiving a purchase order (PO).

View Purchase Order Status (POQSTAT)

This application now displays the new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**.

Create Purchase Orders (PPPGPO)

The value of the new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**, is retrieved from the vendor master for new PO lines (new POs and existing PO/Release) and new release for an existing blanket order.

Import Purchase Orders (AOPUTLPO)

The value of the new vendor classifications, **8(a) Certified** and **AbilityOne Non-Profit Agency**, is retrieved from the vendor master and defaults to the corresponding columns.

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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