Deltek

Deltek Costpoint® GovCon Cloud 8.1

Major Feature Release Notes

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Welcome to Costpoint 8.1

Welcome to Costpoint 8.1! This document details all of the enhancements contained in this release, organized by domain.

Helpful Resources

As you work in Costpoint, the following items may prove helpful:

Name	Description	Link
Costpoint Cloud Information Center	Stand-alone hub containing all Costpoint documentation for cloud users.	CIC Cloud
Learning Aids Online Help Topic	Online help topic with links to all Costpoint videos, quick steps, and clickguides.	Learning Aids
Online Help	Stand-alone online help system available outside of Costpoint. See more information in the next section.	Help
Costpoint 8.1 Documentation Landing Page	Documentation Landing Page with direct links to the online help, CCICs, Release Notes Landing Page, Data Dictionary, and the Deltek Support Center.	Documentation Page

Note: Many documents are accessible through more than one location.

Online Help

Hosted Help

Your Costpoint environment is hosted.

Hosted help is accessed through the web, not locally. Users do need Internet access to use the help this way. See Hosted Help.

Transition to a New Format

As part of Deltek's continuing effort to improve the usability of the Costpoint online help, it is being rewritten using the latest DITA-based documentation tools.

Because of the massive amount of work to rewrite the entire online help system, portions of the rewritten help will be released as they are completed. All existing help information is still available during this transition phase to DITA, but the look of some help topics may vary.

Display Issues

If you use Internet Explorer and the online help does not display correctly, you need to turn off the Compatibility View for the browser. Click **Tools » Compatibility View settings**, and clear the **Display intranet sites in Compatibility View** check box. And then, refresh the browser. Make sure you remove deltek.com (if listed) from the websites you have added to the Compatibility View list.

Costpoint Business Intelligence 8.1 Documentation

The documentation for Costpoint Business Intelligence 8.1, formerly known as Costpoint Enterprise Reporting, is available in Deltek Software Manager (DSM) and is part of Costpoint 8.1.

Cross-Domain Enhancements

This section describes Costpoint 8.1 enhancements covering several domains and applications.

Offline Time Entry

You can now work in Costpoint without connecting to the Internet. In Offline mode, you can view records in applications, as well as update and add records. When you reconnect to the Internet, you can synchronize your updates to the Costpoint database. There are a variety of reasons to work in Offline mode. For example, you might want to work in an area that has no Internet, or you might have a slow or intermittent Internet connection.

Offline mode is supported on Windows OS, as well as Android and iOS mobile devices.

Offline capabilities are available in Costpoint and Time and Expense on laptops and mobile devices when accessed through the browser/PWA. The Costpoint Mobile Time and Expense application also supports Offline mode with different features.

Attention: For information about the Admin settings for offline access to Costpoint, see Offline Mode.

Mobile Time and Expense

To use the Offline Time Entry feature in the Costpoint Mobile T&E application, your system administrator must provide you the timesheet offline access through the **Allow Offline Access** option in Costpoint Time & Expense.

Once you have been provided with the timesheet offline access in Costpoint, the **Make Timesheets Available Offline** item displays on the Costpoint Mobile T&E application menu upon login. Tapping **Make Timesheets Available Offline** displays the Make Available Offline screen, which you use to download your timesheet data for the current, previous, and next periods to the Costpoint Mobile T&E application and make them available to you offline.

Attention: For more information, see Offline Time Entry (8.1+).

Hey Deltek!

Hey Deltek! is a virtual personal assistant which helps you enter and manage data in Costpoint and Costpoint Mobile by listening to your voice and performing a task you tell it to do. Costpoint will use the microphone on your computer or device to listen to your commands. You can use one of the following options to give Costpoint access to the microphone:

- Click on the Global Toolbar.
- Click **Voice** on the Options menu.
- Select the **Enable Hey Deltek! Voice Interaction** check box in Configure User Preferences.

Hey Deltek! voice interaction is supported on Chrome, Windows, and Android operating systems.

New settings are also available to support voice interaction with Costpoint. Hey Deltek! voice interaction is enabled for all users by default, but you can disable it manually.

Various voice commands are enabled in the following applications to let you perform actions without typing anything on your screen:

- **Manage Leads and Contacts (CTMLEAD)**: Here, Hey Deltek! lets you call and email a lead, update the qualified stage for a lead, find a lead's phone number, add notes for a lead, and many more.
- **Timesheet (TMMTIMESHEET)**: Actions you can perform on this screen include navigating to different days/dates and timesheet periods, adding and deleting hours or charges on the timesheet, signing the timesheet, and various other commands.

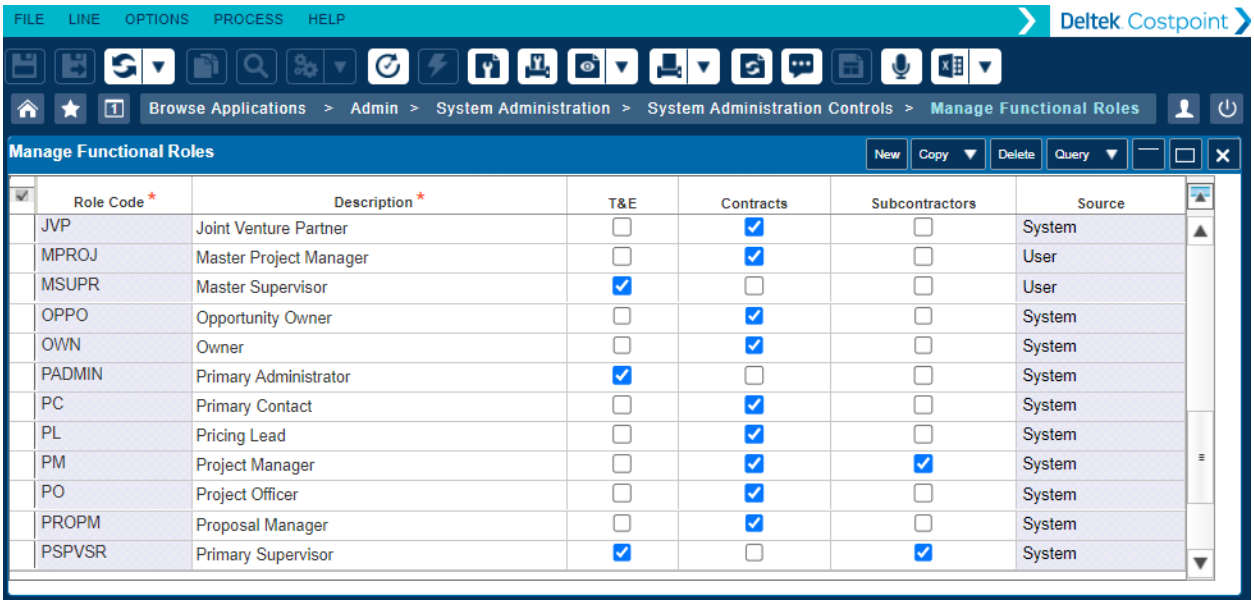
Attention: For more information, see the following sections:

- Hey Deltek! Voice Interaction Settings
- Hey Deltek! in Manage Leads and Contacts
- Voice Interaction for Time Entry

Central Location for Managing Roles

Beginning in Costpoint 8.1, you can manage roles used in different areas in Costpoint in one central location: on the Manage Functional Roles screen. On this new screen, you can:

- View system-defined roles.
- Create new roles.
- Modify and delete role records.
- Specify if the roles should be available for use in certain areas in Costpoint.



Role Code *	Description *	T&E	Contracts	Subcontractors	Source
JVP	Joint Venture Partner	☐	☑	☐	System
MPROJ	Master Project Manager	☐	☑	☐	User
MSUPR	Master Supervisor	☑	☐	☐	User
OPPO	Opportunity Owner	☐	☑	☐	System
OWN	Owner	☐	☑	☐	System
PADMIN	Primary Administrator	☑	☐	☐	System
PC	Primary Contact	☐	☑	☐	System
PL	Pricing Lead	☐	☑	☐	System
PM	Project Manager	☐	☑	☑	System
PO	Project Officer	☐	☑	☐	System
PROPM	Proposal Manager	☐	☑	☐	System
PSPVSR	Primary Supervisor	☑	☐	☑	System

All roles established in Manage Functional Roles can be used as project roles on the Manage Project Roles screen, a new application now available in the Projects domain.

You can use the roles in the following areas if their respective check boxes are selected on the Manage Functional Roles screen:

- **CRM & Contracts domain**: Roles with the **Contracts** check box selected load on the Manage Contract Management Roles (CTMROLES) screen.

- **Subcontractor module in the Projects domain**: Roles with the **Subcontractors** check box selected load on the Manage Work Assignment Roles (SMMWROLE) screen.
- **Time & Expense domain**: Roles with the **T&E** check box selected load on the Functional Roles (ADMFUNCTIONALROLE) screen.

> **Note:** If your Time & Expense instance is co-deployed with Costpoint, role codes and descriptions will come from the Manage Functional Roles screen.
>
> If you have a stand-alone T&E system, you will continue to add roles in T&E as you do currently.

Only the role code and descriptions are maintained in Manage Functional Roles (that is, you cannot add, delete, or edit role code and descriptions on the other Roles screens). All the other settings on the individual Roles screens can be modified.

To learn more about this enhancement and application updates, see the following sections:

- Managing Functional and Project Roles (Projects Domain)
- Costpoint Functional Roles (Time & Expense)

Streamline Workflows with Flyout Navigation Banners

This covers Accounting, Projects, People, and Materials.

To help eliminate the need to remember complex processes and to make it easier to navigate a workflow, Costpoint provides you the option to use a navigation fly-out banner as a guide from **My Menu**. The navigation banner, which displays at the top of an application screen, is made of application links displayed in the order of a process flow.

This feature provides users who are assigned the Basic Screens (DLTKSMB) UI profile multiple navigation banners for different workflows. It also provides UI profiles with built-in Navigation Banners that are designated for Materials users who have Buyer, Planner, and Sales Order Entry roles.

You can access **My Menu** by clicking the upper-left portion of your screen. Provided that you have authorization, you can modify your **My Menu** settings in Configure User Preferences where navigation banners can be copied and edited for customization, or you can set up your own workflow.

Navigation Banners for the Basic Screens UI Profile

The following are navigation banners for different Costpoint workflows and their corresponding screens. These are available to users who are assigned the Basic Screens UI profile:

Group Header	My Menu Title	Screen
New Employee Setup	New Employee Information	Manage Employee Information
	New Salary Information	Manage Employee Salary Information
	New Leave Information	Manage Employee Leave
	Link Employee to Project	Manage Employee Work Force

Group Header	My Menu Title	Screen
	Export to TE	Export Data to Deltek Time and Expense
	Import to TE	Import Master Data
New Project Setup	New Project Setup/Project Edits	Manage Project User Flow
	Revenue Formula Setup	Manage Revenue Information
	Billing Formula Setup/Review	Manage Project Billing Information
	Funding/Modification Setup/Review	Manage Modifications
	Setup Default Rate Sequence	Manage Rate Sequence Orders
	Create Labor Categories – TM	Manage Project Labor Categories (PLC)
	Link Labor Categories to Projects – TM	Link Project Labor Categories to Projects
	Link Labor Category Rates to Projects – TM	Link Project Labor Category Rates to Projects
	Link Employees to Projects/Labor Categories	Manage Employee Work Force
	Export to TE	Export Data To Deltek Time and Expense
	Import to TE	Import Master Data
AP Vouchers	Review Vendor	Manage Vendors
	Enter AP Vouchers	Manage Accounts Payable Vouchers
	Print AP Edit Report	Print Voucher Edit Report
	Post AP Vouchers to GL	Post Vouchers
AP Payment	Run Open AP Report	Print Open Accounts Payable Report
	Select AP Vouchers for Payment	Select Vouchers for Payment
	Print Prepayment Report	Print Prepayment Edit Report
	Print/Void Checks	Print/Void Checks

Group Header	My Menu Title	Screen
	Enter Manual Checks	Manage Manual Checks
	Create EFT File (Only for EFT's)	Create EFT File
	Post Checks to GL	Post Cash Disbursements
Cash Receipt Processing	Print Open AR Report	Print Accounts Receivable Aging Report
	Enter Deposits/Cash Receipts	Manage Cash Receipts
	Print Cash Receipt Edit Report	Print Cash Receipts Edit Report
	Post Cash Receipts to GL	Post Cash Receipts
Timesheet Processing	Export Timesheets to Costpoint	Export Timesheets
	Import Timesheets into Costpoint	Import Timesheets from Deltek Time and Expense
	Review/Edit Timesheets	Manage Timesheets
	Print Timesheet Edit Report	Print Timesheet Information Report by Employee
	Post Timesheets to GL	Post Timesheets
	Compute Leave	Compute Leave Accruals
	Print Leave Edit Report	Print Leave Edit Report
	Manage Leave Edit Table	Manage Leave Edit Table
	Post Leave Accruals	Post Leave Accruals
	Close Leave Period	Close Leave Period
	Export to TE	Export Data To Deltek Time and Expense
	Import into TE	Import Master Data
Invoicing	Load Labor Rates	Load Labor Rates
	Calculate Standard Bills	Calculate Standard Bills
	Review Invoice and Select	Manage Standard Bills
	Print Invoices	Print Standard Bills

Group Header	My Menu Title	Screen
	Post Invoices to GL	Post Standard Bills
Manage Pools/Print SIE	Add Accounts/Orgs to Pools and Calc	Cost Pool Processes
	Print Indirect Rates Report (SIE)	Compute/Print Pool Rates
	Print Indirect Rates Journal Edit	Print Allocation Journal Edit Report
	Post Cost Pool Allocations to GL	Post Pool Journals
Revenue	Compute Revenue Processes	Compute Revenue Processes
	Run Post Revenue Report and Post	Post Revenue
Print Project Reporting	Create Project Reports	Reporting Processes
	Print Project Status Report/Project Income Statement	Print Project Status Report
	Print Revenue Summary Report	Print Revenue Summary Report
	Print Revenue Worksheet	Print Revenue Worksheet
	Print Labor Summary Report	Print Project Labor Summary Report
	Print Non Labor Detail	Print Project Non-Labor Detail Report
Bank Reconciliation Process	Create Bank Account History	Create Bank Transactions History
	Update Beginning Bank Statement Balance	Update Beginning Bank Statement Balances
	Accept Bank Transactions	Accept Bank Transactions
	Process Bank Transaction Acceptances	Process Bank Transaction Acceptances
	View Bank Reconciliation Summary	Print Bank Reconciliation Summary Report
Period Close	Test Close the Period	Close Periods
	Build GL Report Tables	Create General Ledger Report Tables

Group Header	My Menu Title	Screen
	Print Balance Sheet/Income Statement	Print Financial Statements
	Print Financial Statement Detail Report	Print Financial Statement Detail Report
	Print Trial Balance	Print Trial Balance Report
	Print GL Detail	Print General Ledger Detail Report
	Print Open AR Report	Print Accounts Receivable Aging Report
	Print Open AP Report	Print Open Accounts Payable Report
	Print Revenue Summary	Print Revenue Summary Report
	Close Period	Close Periods

UI Profiles and Navigation Banners for Materials Users

The following are UI Profiles that can be assigned to users to access standard navigation banners for these workflows and their corresponding screens:

UI Profile	Group Header	My Menu Title	Screen
DEFAULT_BUYER	**Buyer Menu**	Apply PO Info to PR	Apply PO Info to Purchase Requisitions
		Manage RFQs	Manage Request for Quotes By Vendor
		Manage Quotes	Manage Vendor Quotes By Vendor
		Create POs	Create Purchase Orders
		Manage POs	Manage Purchase Orders
		Expedite POs	Expedite Purchase Orders
		View PO Status	View Purchase Order Status
		Buyer Dashboard	Buyer Dashboard
DEFAULT_PLANNER	**Planner Menu**	Manage MOs	Manage Manufacturing Orders

UI Profile	Group Header	My Menu Title	Screen
		Print MO Docs	Print Manufacturing Order Documentation
		Expedite MOs	Expedite Manufacturing Orders
		Enter MO Reliefs	Enter Manufacturing Order Reliefs
		View MO Status	View Manufacturing Order Status
DEFAULT_SALES	**Sales Menu**	Manage Customers	Manage Customers
		Manage SOs	Manage Sales Orders
		Print SO Acknowledgements	Print Sales Order Acknowledgements
		View SO Status Info	View Sales Order Status Information

Accounting

This section describes Costpoint 8.1 enhancements for the Accounting domain.

Post Gains/Losses to Projects

Costpoint has been updated to enable you to post foreign exchange gains and losses to a project. This allows you to report specific projects for local taxes and other local requirements without having to create a new company for each reporting currency.

If you set up Costpoint to post to currency gains/losses to a project, you must enter project accounts where the foreign exchange gains/losses will be charged. When you post cash disbursements, cash receipts, and realized and unrealized gains/losses to projects, gains/losses will be reflected on the project accounts that you entered.

Multiple screens have been updated to support this enhancement.

Accounting

Configure Multicurrency Settings (MUMSETNG)

The new **Post Gains/Losses** group box has been added to the Configure Multicurrency Settings screen. It contains two options: **Consolidated** and **By Project**. These two options are enabled only when you select **ITD Balance** in the **Compute Unrealized Gains/Losses Method** group box.

Select the **By Project** option to post unrealized gains/losses to project accounts. If you select this option, you must enter project accounts where the gains/losses will be posted on the Manage Multicurrency Accounts screen.

If you select the **Consolidated** option, gains/losses will be posted to non-project accounts. This is the same functionality that currently exist in Costpoint 7.1.x and 8.0.x.

Warning: Once you have configured the computation method and posting settings for gains/losses, we recommend that you do not change these configurations. Any modification may cause errors or discrepancies in computing and posting gains/losses.

Manage Multicurrency Accounts (MUMACCTS)

New group boxes have been added to the **Realized Gains and Losses** and **Unrealized Gains and Losses** group boxes: **Select Project Accounts** and **Select Project Organizations**.

The **Select Project Accounts** group box has the following fields:

Field	Description
Gain Project Acct	Use this field to enter or select the project-required account to which your realized or unrealized gains for a project will be posted.
Loss Project Acct	Use this field to enter or select the project-required account to which your realized or unrealized losses for a project will be posted.

Note: The project accounts you enter in these fields must be included in a project account group. If the account you entered is not included in a project account group, Costpoint will post the entries to a non-project account. Use the Manage Project Account Groups screen in the Projects domain to set up account groups for your projects.

The **Select Project Organizations** group box has the following options:

Option	Description
Use A/P or A/R Org	Select this option to charge realized or unrealized gains and losses to the same organization as the posting AP or AR organization.
Use Other Org	Select this option to charge realized or unrealized gains and losses to an organization that is different from the posting AP or AR organization. In the related field, enter, or click to select, the organization.
Use Project Owning Org	Select this option to charge realized or unrealized gains and losses to the organization linked to the project account.

Compute/Post Unrealized Gains/Losses (APPUNRL)

This screen has been updated to post unrealized gains/losses to project accounts if the **By Project** option is selected in the **Post Gains/Losses** group box of the Configure Multicurrency Settings screen. Unrealized gains/losses posted to project accounts will also be reflected when you print the Unrealized Gain/Loss for Accounts Payable or Unrealized Gain/Loss for Accounts Receivable reports.

The **Sort Order** group box has also been added to this screen. You can use this field to set the sorting method on the Unrealized Gain/Loss for Accounts Payable report. It contains the following options:

Option	Description
Acct/Org/Proj	Select this option to arrange the entries on the Unrealized Gain/Loss for Accounts Payable report first by account, by organization, and then by project. If you select this option, the subtotal for unrealized gain/loss displays on the report by account.
Proj/Acct/Org	Select this option to arrange the entries on the Unrealized Gain/Loss for Accounts Payable report first by project, by account, and then by organization. If you select this option, the subtotal for unrealized gain/loss displays on the report by project.

This group box is enabled only when you select the **Acct Payable** option in the **Unrealized Gains/Losses** group box, and if the **By Project** option is selected on the Configure Multicurrency Settings screen.

Post Cash Disbursements (APPPSTCD)

This screen has been updated to post gains/losses to project accounts when you post cash disbursements, if the **By Project** option is selected in the **Post Gains/Losses** group box of the Configure Multicurrency Settings screen. Gains/losses posted to project accounts will also be reflected when you print the Cash Disbursements Journal.

Post Cash Receipts (ARPCR)

If the **By Project** option is selected on the Configure Multicurrency Settings screen, the project ID, project account, and the gain/loss entries posted to that project will be reflected on the Cash Receipts Journal when you post cash receipts.

Manage Accounts Receivable History (ARMHIST)

The new **Realized Gain/(Loss)** field has been added to the **Functional Currency Totals** group box. It displays the sum of all realized gains minus the sum of all realized losses in the table window.

View Receivables and Collections (ARMOREC)

The new **Realized Gain/(Loss)** field has been added to the **Functional Currency Totals** group box. It displays the sum of all realized gains minus the sum of all realized losses in the table window.

People

Post Timesheets (LDPLDJ)

When you select the **By Project** option in the **Post Gains/Losses** group box of the Configure Multicurrency Settings screen, the Post Timesheets process will use the following fields on the Manage Multicurrency Accounts screen as the default values for Realized Gains/Losses:

- **Gain Project Account** field
- **Loss Project Account** field
- **Select Project Organizations** group box option

> **Note:** In the **Select Project Organizations** group box, when you select **Use A/P or A/R Org** or **Use Project Owning Org**, the Post Timesheets process will use the employee's home organization as the default value. When you select the **Use Other Org** option, the application will use the specified organization.

The Post Timesheets process will require values in the **Gain Project Account** and **Loss Project Account** fields on the Manage Multicurrency Accounts screen if you select the **By Project** option on the Configure Multicurrency Settings screen, and if there is a project on the timesheet line.

When you select the **Consolidate** option in the **Post Gains/Losses** group box of the Configure Multicurrency Settings screen, the Post Timesheets process will use the following fields on the Manage Multicurrency Accounts screen as the default values for Realized Gains/Losses:

- **Gain Non-Proj Acct** field
- **Loss Non-Proj Acct** field
- **Select Organizations** group box option

Reconcile Leave Balances (LDPLVREC)

When you select the **By Project** option in the **Post Gains/Losses** group box of the Configure Multicurrency Settings screen, the Reconcile Leave Balances process will use the following fields on the Manage Multicurrency Accounts screen as the default values for Realized Gains/Losses:

- **Gain Project Account** field
- **Loss Project Account** field
- **Select Project Organizations** group box option

> **Note:** In the **Select Project Organizations** group box, when you select **Use A/P or A/R Org** or **Use Project Owning Org**, the Reconcile Leave Balances process will use the employee's home organization as the default value. When you select the **Use Other Org** option, the application will use the specified organization.

The Reconcile Leave Balances process will require values in the **Gain Project Account** and **Loss Project Account** fields on the Manage Multicurrency Accounts screen if you select the **By Project** option on the Configure Multicurrency Settings screen, and if there is an Accrual Project assigned to the Leave Type being processed.

When you select the **Consolidate** option in the **Post Gains/Losse**s group box of the Configure Multicurrency Settings screen, the Reconcile Leave Balances process will use the following fields on the Manage Multicurrency Accounts screen as the default values for Realized Gains/Losses:

- **Gain Non-Proj Acct** field
- **Loss Non-Proj Acct** field

Select Organizations group box option

Multi-User Report Printing

The Post Journal Entries application now allows multiple users to print the Journal Entries Journal at the same time. Similarly, multiple users can simultaneously print the Voucher Distribution Journal on the Post Vouchers screen.

The posting process on both screens remains a single-user functionality; however, the posting can be submitted by multiple users simultaneously. Costpoint will queue the posting/commitment transactions and process them one at a time.

You will have only the option to **Print/Post Journal Entries** and **Print/Post Vouchers** as the **Post Journal Entries** and **Post Vouchers** options are no longer available. The reports generated from the Print/Post process will contain a unique sequencing number and should be retained if needed for historical purposes.

Prevent Reuse of Accounts Payable Accounts and Cash Accounts

The Manage Accounts Payable Accounts and Manage Cash Accounts screens have been updated to have a validation which checks if an account has already been entered or selected as an Accounts Payable (AP) account or a cash account.

If you enter or select an account as an AP account, you can no longer enter or select it as a cash account. Likewise, if you enter or select an account as a cash account, you can no longer enter or select it as an AP account.

This will prevent errors that may arise when posting cash disbursements to reused accounts.

Manage Accounts Payable Accounts (APMACCT)

If you enter or select an account that is already entered on the Manage Cash Accounts screen, an error message displays stating “This account is already used as a Cash Account in Manage Cash Accounts. Select a different account”.

Manage Cash Accounts (APMCASH)

If you enter or select an account that is already entered on the Manage Accounts Payable Accounts screen, an error message displays stating “This account is already used as an AP Account in Manage Accounts Payable Accounts. Select a different account”.

Allow Reversing Journal Entry for "Not Available" Periods

Costpoint has been updated to allow the creation of a reversing journal entry for a fiscal year, period, or subperiod with a status of **Not Available**. This allows you to enter reversing journal entries that reverse in future periods without having to open that period.

Once that period is opened, the reversing journal entry will be available for review, approval, and posting, depending on your system requirements.

Multiple Costpoint Accounting screens have been updated to support this feature.

Configure General Ledger Settings (GLMSETNG)

You can set up Costpoint to allow creation of reversing journal entries for **Not Available** periods by selecting the new **Allow Reversing Entry Creation in a Not Available FY/Period/Subperiod** check box that has been added on the Configure General Ledger Settings screen.

Manage Journal Entries (GLMJE)

Once you set up Costpoint to allow creation of reversing journal entries for **Not Available** periods, you can enter or select a **Fiscal Year**, **Period**, or **Subperiod** with a **Not Available** status on the Reversing subtask.

When you click **Save**, a warning message displays stating “Reversal status is set as ‘Not Available’ for the Reversal Fiscal Year/Period/Subperiod combination.” Click **OK** to proceed, or click **CANCEL** to abort saving the record.

If you click **OK**, Costpoint will create the reversing journal entry in the **Not Available** period you entered.

Post Journal Entries (GLPJE)

When you select the **Allow Reversing Entry Creation in a Not Available FY/Period/Subperiod** check box on the Configure General Ledger Settings screen and you post reversing journal entries with a reversal in a period with a **Not Available** status, the reversing journal entry is created in that period but is not yet posted.

The unposted journal will remain in the **Not Available** period until that period is ready and is opened and the reversing journal entries are approved and posted.

Import Journal Entries (AOPUTLJE)

When you select the **Allow Reversing Entry Creation in a Not Available FY/Period/Subperiod** check box on the Configure General Ledger Settings screen, you can import adjusting and recurring journal entries that have their **Reversing** column set to **Y** for Fiscal Years/Periods/Subperiods with a **Not Available** status.

Restrict Accounts for Non-Profit Reporting

This enhancement adds the **Non-Profit Information** group box, containing the **Restricted** check box, to the Manage Accounts screen. This will allow you to mark accounts as restricted when you generate non-profit reports using Costpoint Business Intelligence (CBI).

When you print an Account List report, the **Non-Profit Restricted Flag** displays on the report to indicate if an account is restricted for non-profit reporting.

The RST_FL column has also been added to the ACCT table used in the General Ledger model in the Reports and Analytics domain to enable Costpoint to identify and exclude accounts you marked as restricted when you generate non-profit reports using CBI.

CRM & Contracts

This section describes Costpoint 8.1 enhancements for the CRM & Contracts domain.

Domain Name Change to “CRM & Contracts”

As Deltek continues to expand Costpoint Contract Management functionalities, the Contracts domain has been renamed to CRM & Contracts. This is in line with efforts to offer solutions that can help you better identify and assess potential opportunities, track contracts and related activities, improve customer relationship management (CRM), and win more business.

Aside from the change in the navigation menu, the following applications have been updated for this enhancement:

- **View License Information (SYMLICEN)**: In the Licensed Add-On Modules table window, the **Product Name** for CTM is updated from “Contract Management” to “CRM & Contracts.”
- **Print Menu Report (SYRMENU)**: In the **Include Domain** group box, the **Contracts** check box has been renamed to **CRM & Contracts**.

CMMC Level Added to Opportunities

The US Department of Defense (DoD) has created the Cybersecurity Maturity Model Certification (CMMC) framework to enhance the protection of controlled unclassified information (CUI) within the Defense Industrial Base (DIB) networks. The CMMC framework adds a certification element and is designed to provide increased assurance to the DoD that a DIB contractor can adequately protect CUI at a level commensurate with the risk.

There are currently five levels of CMMC certifications. Controls and processes associated with each level are aimed to reduce the risk against a specific set of cyber threats.

DIB contractors who would like to get their certifications and CMMC levels will undergo assessment conducted by authorized and accredited CMMC Third Party Assessment Organizations.

> **Attention:** For more information on CMMC, visit https://www.acq.osd.mil/cmmc/. You can find FAQs here: https://www.acq.osd.mil/cmmc/faq.html.

To support this recent development in the DoD supply chain, Costpoint has added CMMC information in opportunities. On the Status tab of the Manage Opportunities screen, the **CMMC Level** drop-down list is now available, and you can select the CMMC level stated in the opportunity. Options include **None** and levels from **1** (simply performed processes, basic cyber hygiene practices) to **5** (optimized processes, advanced/progressive cyber hygiene practices). If you are going after multiple opportunities, you can do a query on this field to see how many opportunities that you are pursuing require CMMC certification.

The Import GovWin IQ Data has been updated as well to copy the **CMMC Level** value from GovWin IQ when importing opportunities from GovWin IQ into Costpoint.

Contract Long Name

You can now specify a more comprehensive and useful description of the contract through the new **Long Name** field added to the General tab of the Manage Contracts screen. The longer description, which is up to 120 characters, will allow you to identify contracts more easily.

The **Contract Name** value defaults in this field, but you can modify it. If the contract is associated with an opportunity, the opportunity name is the default value. You can modify or delete the **Long Name** value at any time.

The Project Initialization subtask (available both in Manage Contracts and Manage Opportunities) has been updated as part of this enhancement. If you select the **Include Basic Info** check box on this subtask, Costpoint includes the project long name (PROJ_LONG_NAME) when initializing a project from a contract or opportunity. A new **Destination Project Long Name** field is also added to the Details table window. This field is populated as follows:

- When a project is initialized from a contract, the contract's **Long Name** populates this field. If the contract long name does not exist, the contract name is the default value.
- When a project is created from an opportunity, the opportunity name defaults in this field.

Attention: Related enhancements have been made to the Projects domain. For more details, see the Project Long Name section of this document.

Enhanced Activities

Costpoint now provides you a central location for managing activities in the CRM & Contracts domain through the new Manage Activities screen. Several other applications have also been updated to give you enhanced functionalities in adding and tracking activities.

Manage Activities (CTMACTV)

On this screen, you can create activities and associate them to opportunity, contract, subcontract, and/or lead/contact records. You can also enter generic activities that are not specifically tied to a record.

You can associate a single activity with only one contract, one opportunity, and/or one subcontract record, but you can link an opportunity, contract, or subcontract to multiple activities. For example, you can create a new activity and link it to an opportunity/contract/subcontract record that was already associated with other activities.

You can also add multiple tasks and resources to an activity. Contacts that you can link to the activity include employees, vendors, customers, leads, and other resources. Both prospective and regular customers and vendors can be added.

This application resides in the new Activities module in the CRM & Contracts domain and is also available as a subtask of the following screens:

- Manage Opportunities
- Opportunities Quick View
- Manage Contracts
- Manage Subcontracts
- Manage Leads and Contacts

The previous Activities subtask on these screens has been updated to reflect enhanced functionalities available in Manage Activities.

Note: A new toolkit is created to help you migrate your data from the old Activities subtask to the new subtask and database tables. See Migrate Contract Management Activities Toolkit (CTPACTTK) for more details.

You enter the related opportunity, contract, and subcontract records on the main screen of Manage Activities, while you can add related lead/contact records through the Resources subtask.

When you link an activity to a record in Manage Activities, that activity together with the task and resource information will be available on the Activities subtask of the respective application. For example, if you associate the activity with an opportunity record and a contract record, that activity will display on the Activities subtask of the Manage Opportunities, Opportunities Quick View, and Manage Contracts screens. That same activity record will not be viewable in Manage Subcontracts and Manage Leads and Contacts since no subcontract and lead/contact records are linked to the activity.

Similarly, activities you add via the Activities subtask on these screens are loaded in Manage Activities. Note, however, that in Opportunities Quick View, the Activities subtask and its child subtasks are all read-only; you can view activity data related to the opportunity, but you will not be able to add, edit, or delete activity records.

Through this centralized location, you can:

- Look up all activities connected to your opportunities, contracts, subcontracts, and leads/contacts, as well as view all the other general activities.
- Do a query to see if you are an activity/task owner or a resource of any records.
- Track activities based on due date or completed date.
- Search for records based on priority, status, and other options available on the screen.
- Notify the activity and/or task owner about the activity/task.

Also part of this feature is the ability to add activities and tasks to your Outlook calendar. The **Download Outlook (.ics)** button is available on the main screen as well as on the Tasks subtask, in Form view on both locations. This button displays only after you have saved the record. When you click this button, Costpoint downloads an .ics file containing information about the activity or task, including the due date, description, and additional notes for the activity/task. You can click the downloaded file on the browser window, or you can open it from your local Downloads folder. You can save the file as is or make modifications before adding it to your schedule.

Manage Activities in Costpoint Mobile

When you use Costpoint on a mobile device, additional functionalities are enabled for the Manage Activities application:

- List view
- Saved query tabs
- Swipe functionality

Attention: See the online help for more information on the additional functionalities enabled for specific screens when accessed in mobile devices. In the Table of Contents of the online help, navigate to **Accessing Costpoint » Costpoint Mobile Features**.

The other applications that are created/updated for this enhancement are listed below.

Migrate Contract Management Activities Toolkit (CTPACTTK)

This new toolkit allows you to migrate activities from the old functionality into the new Manage Activities screen and enhanced Activities subtask. Data is moved from the old CT_ACTIVITIES table into the new CT_ACTV_MASTER and CT_ACTV_RESOURCES tables.

You have the option to run validation log files to check if there are any data issues prior to migrating data. You can also choose to delete migrated records from the old table to avoid any data duplication for new records.

On the screen, you can specify how the toolkit should generate activity IDs for new activity records, as well as indicate how other attendees that exist in the old records should be migrated into the new records.

The migration process is designed to run only once to avoid data duplication. Costpoint displays a message on this screen when migration has already been performed.

If you have not migrated activities from the old table and you open Manage Activities or the enhanced Activities subtask, Costpoint displays a message informing you to migrate the old records so you can access them on those screens.

Note: Records on the Activities subtask of the Manage Organizational Conflict of Interest (OCI) screen will remain in the CT_ACTIVITIES table. These will not be included in the migration process.

To access the toolkit, click **Contracts » Contract Management Controls » Utilities » Migrate Contract Management Activities Toolkit**.

Configure Contract Management Settings (CTMSETNG)

Use the new **Activities** group box on this screen to set up how Costpoint should handle activity IDs. This group box has the following fields:

- **Auto-Assign Activity IDs**: Select this check box to have Costpoint automatically assign an ID to any new activity record.
- **Last Activity ID**: If you selected the **Auto-Assign Activity IDs** check box, you must enter the last activity ID used in this field. This sets the starting point for Costpoint-generated activity IDs. Make sure to enter enough numeric digits at the end of the ID as this determines the number of activity IDs that Costpoint can generate/increment.

Manage Activity Methods (CTMACTM)

Duplicate values in the **Activity Method Description** field are no longer allowed. Make sure to enter a unique description for the activity method when adding or editing records on this screen to avoid an error.

Manage Activity Subject (CTMACTS)

Duplicate values in the **Activity Subject Description** field are no longer allowed. Make sure to enter a unique description for the activity subject when adding or editing records on this screen to avoid an error.

Manage Employee Information (LDMEINFO)

If you attempt to delete an employee that is already used as an activity/task owner or a resource in Manage Activities, Costpoint displays an error message indicating that the record cannot be deleted as it is currently in use.

Manage Customers (ARMCUST)

If you attempt to delete a customer, customer address, or customer contact that is already used on the Resources or Tasks subtask of Manage Activities, Costpoint displays an error message indicating that the record cannot be deleted as it is currently in use.

Manage Vendors (APMVEND)

If you attempt to delete a vendor, vendor address, or vendor contact that is already used on the Resources or Tasks subtask of Manage Activities, Costpoint displays an error message indicating that the record cannot be deleted as it is currently in use.

Manage Contract Management Customer Info (CTMCUST)

If you attempt to delete a prospective customer, prospective customer address, or prospective customer contact that is already used on the Resources or Tasks subtask of Manage Activities, Costpoint displays an error message indicating that the record cannot be deleted as it is currently in use.

Manage Contract Management Vendor Info (CTMVEND)

If you attempt to delete a prospective vendor, prospective vendor address, or prospective vendor contact that is already used on the Resources or Tasks subtask of Manage Activities, Costpoint displays an error message indicating that the record cannot be deleted as it is currently in use.

Approve Prospective Customers (CTMCUSTA)

If a prospective customer is used in an activity as a resource or task owner, upon approval of the prospective customer on this screen, Costpoint reflects the type and ID of the newly created customer in the related activity.

Approve Prospective Vendors (CTMVENDA)

If a prospective vendor is used in an activity as a resource or task owner, upon approval of the prospective vendor on this screen, Costpoint reflects the type and ID of the newly created vendor in the related activity.

Hey Deltek! in Manage Leads and Contacts

One of the features introduced in Costpoint 8.1 is Hey Deltek!, a virtual personal assistant that helps you enter and manage data in Costpoint and Costpoint Mobile by listening to your voice and performing tasks you ask it to do. You can enter information or perform actions using the voice interface instead of manually typing entries on the screen.

Hey Deltek! lets you do the following actions on the Manage Leads and Contacts screen:

- Activate Hey Deltek!
- Open the application.
- Call and email a lead.
- Update the qualified stage for a lead.
- Find business affiliations for a lead.
- Find a lead’s phone number.
- Add notes for a lead.
- Save your changes to a record.
- Stop voice entry.
- Say goodbye to close the application and log out of Costpoint.

In most commands, you will need to specify the name of the lead after mentioning the task. If you are having issues with the system recognizing the name, you also have the option to spell out the name.

The following table lists the actions and sample commands that you can perform on the screen using Hey Deltek!

Actions	Voice Command Examples
Initiate voice interaction.	"Hey Deltek!"
Open the application.	“Open Manage Leads and Contacts.” The open application voice command works from the navigation menu and opens any Costpoint application. The application name must match the menu name. Note, however, that this will not work if you have another application already open.
Obtain a list of available voice commands.	"Help."
Call a lead.	"Call Ron Brown."
Email a lead.	"Email Ron Brown."
Update the qualified stage for a lead.	"Update the qualified stage for Ron Brown." Hey Deltek! will then ask you what stage you would like to change the current stage to. Or you can say: “Update the qualified stage for Ron Brown to <*stage*>.” For example, “Update the qualified stage for Ron Brown to Qualified.”
Save the record.	"Save" or "Save and continue."
Find business affiliations for a lead.	"Are there any business affiliations for Ron Brown?"
Find a lead’s phone number.	"Find phone number for Ron Brown."
Add notes for a lead. (if the lead record is currently not displayed on the screen or its row is not highlighted in the table window)	"Add Notes for Ron Brown." Hey Deltek! will then ask you to dictate the notes.
Add notes. (if the lead record displays on the screen or its row is highlighted in the table window)	"Add Notes." Hey Deltek! will then ask you to dictate the notes.
End voice entry.	"Stop voice." The voice icon will be disabled, but the red dot for active listening will still be enabled. To inactivate both the voice icon and active listening, go to the Configure System Settings screen and select the **Disable Hey Deltek!** check box.

Actions	Voice Command Examples
Close the application and log out of Costpoint.	"Goodbye." If there are no unsaved changes, the system will say "Goodbye, ending Leads voice entry." It will then close the application and log you out of Costpoint. If there are unsaved records, the system will ask if you would like to save the changes now.

Attention: For information on enabling and disabling Hey Deltek! in your Costpoint system as well as details on the device/browser requirements, see the Hey Deltek! section in this document.

You can also refer to the "Hey Deltek!" section of Costpoint's online help for additional information on Hey Deltek! and available commands used in other applications.

Opportunity Assessments

Costpoint is giving you the ability to track opportunity assessments that can help you make sure that you are going after the right opportunities. You can use these assessments to quickly identify areas of strengths and weaknesses and to ensure that there are no subjective bidding decisions and that your resources are focused on opportunities that matter most.

You can manually enter these opportunity assessments into Costpoint or import them from GovWin IQ. This allows you to access all assessments against an opportunity in one location.

Two new applications have been created, and several other screens have been updated for this enhancement.

You can manually set up opportunity assessment information by following these steps:

1. Review Costpoint-defined opportunity assessment rating descriptions on the Manage Opportunity Assessment Rating Descriptions screen, or create your own rating descriptions.
2. Assign rating descriptions to system-defined or new assessment formats on the Manage Opportunity Assessment Formats screen.
3. Go to the Assessments tab of the Manage Opportunities screen.
4. Select the assessment format ID that you would like to use for the opportunity.

   This populates the Opportunity Assessment Details subtask with the rating descriptions assigned to the selected format ID.
5. On the Opportunity Assessment Details subtask, rate the opportunity on each rating description on a scale of 1 to 10 (with 10 representing very good).

Note: If you are using GovWin IQ to Costpoint integration, map GovWin IQ opportunity stages to Costpoint opportunity stages on the Manage Opportunity Stages screen before running the integration. Then, you can view GovWin IQ opportunity assessments in Manage Opportunities.

Manage Opportunity Assessment Rating Descriptions (CTMOPART)

Use this new screen to set up or view opportunity assessment rating descriptions that you can use to evaluate opportunities.

There are 9 system-defined rating codes and descriptions, but you can also add your own rating codes and descriptions. Each description is framed as a question to help you assess your opportunities better. Costpoint-defined rating codes and descriptions include the following:

Rating Code	Description
RTDESC_01	Is this opportunity a strategic fit for our company?
RTDESC_02	How confident are we in the funding and timing for the award?
RTDESC_03	How well does this opportunity match our capabilities?
RTDESC_04	How well positioned are we with this customer?
RTDESC_05	How well differentiated are we versus the competition?
RTDESC_06	Do we have the right experience and past performance?
RTDESC_07	Do we have the necessary resources to bid and manage this contract?
RTDESC_08	Will this opportunity be profitable for our company?
RTDESC_09	Is there enough lead time to shape the requirements and improve our position?

Rating descriptions that exist on this screen can be assigned to assessment formats on the Manage Opportunity Assessment Formats screen if their corresponding **Show in Lookup** check box is selected.

You cannot delete system-defined codes. You can delete user-defined codes only if the format to which it is assigned has not been used in an opportunity assessment. Similarly, system- and user-defined descriptions can be modified only if the format associated with them has not yet been used in any opportunity assessment.

To access this new application, click **CRM & Contracts » Contract Management Controls » Opportunities Controls » Manage Opportunity Assessment Rating Descriptions**.

Manage Opportunity Assessment Formats (CTMOAFRM)

Once you have established your rating descriptions, you can assign them to assessment formats on the new Manage Opportunity Assessment Formats screen. There is one Costpoint-defined format (**STANDARD**), but you can also add new formats.

You must assign at least one rating description to a format before you can save the format. You can assign up to 10 rating descriptions per format.

A **Max Score** is automatically calculated for the assessment format, depending on the number of rating descriptions assigned. Each rating description accounts for a maximum score of 10. So, if you assigned 8 rating descriptions, the maximum score for the assessment format is 80.

Any assessment formats that have the **Show in Lookup** check box selected on this screen will be available in the lookup of the **Assessment Format ID** field on the Assessments tab in Manage Opportunities.

You can open this new screen by clicking **CRM & Contracts » Contract Management Controls » Opportunities Controls » Manage Opportunity Assessment Formats**.

Manage Opportunities (CTMOPP)

The Assessments tab has been added to this screen so you can assess opportunities on different criteria/questions and determine if the opportunities are worth pursuing.

You can manually enter assessment records on this tab, or view assessment records for opportunities imported from GovWin IQ. For manual records, most fields are enabled, and you can enter data that you can use on your assessment. For GovWin IQ records, the fields are automatically populated (or blank) and disabled.

For manually entered records, when you select an assessment format ID, the rating descriptions assigned to that format automatically display on the Opportunity Assessment Details subtask. On this subtask, you can rate the opportunity on each rating description on a scale of 1 to 10 (with 10 indicating very good). The total score for the opportunity for the specific assessment record is displayed on this subtask as well as on the Assessments tab.

You can set the status of manually entered assessment records to **Published** to prevent any further edits, but you can revert it back to **Unpublished** to allow additional changes. For GovWin IQ records, the status is always **Published** and cannot be changed.

Deltek recommends that you set up or review rating descriptions and assessment formats before you assess opportunities on this screen.

Manage Opportunity Stages (CTMSTAGE)

If you are using the GovWin IQ to Costpoint integration, use the new GovWin IQ Mapped Stages subtask on this screen to map valid GovWin IQ opportunity stages to Costpoint opportunity stages. The system uses this mapping in loading GovWin IQ opportunity assessments into Costpoint. On the Assessments tab of Manage Opportunities, the system displays the Costpoint stage that matches the GovWin IQ stage when the GovWin IQ opportunity assessment was made.

All GovWin IQ opportunity stages must be mapped to a Costpoint stage, but not all Costpoint stages are required to have a corresponding GovWin IQ stage.

You can map a Costpoint stage to multiple GovWin IQ stages, but a GovWin IQ stage can be mapped to only one Costpoint stage. Once you have matched a GovWin IQ stage, you can no longer use it on another Costpoint stage.

> **Note:** When mapping, be sure to enter the appropriate GovWin IQ stage that corresponds to the Costpoint stage. Once the integration is run and you change or delete the value in the **GovWin IQ Mapped Stage** field, any previously interfaced opportunity assessments will not reflect the current changes to the mapped GovWin IQ stage.

Import GovWin IQ Data (CTPIQDAT)

This application has been updated to perform the following actions:

- Take into account the mapping of GovWin IQ opportunity stages to Costpoint opportunity stages as established on the Manage Opportunity Stages screen.
- Include opportunity assessment data when importing opportunity information from GovWin IQ into Costpoint.

Projects

This section describes Costpoint 8.1 enhancements for the Projects domain.

Billing Worksheet for Standard Bills

You can now print billing worksheets for standard bills using the new Print Billing Worksheet (BLRBILLW) screen. The worksheet provides details on how the bill was computed for a range of projects and shows you the costs that have already been billed as well as the remaining amounts to be billed.

You can use the Billing Worksheet to determine whether the bill includes all charges, burden amounts are correct, and any fees, retainage amounts, and other billing values are computed correctly. It can also assist you in reconciling the billed and unbilled amounts before finalizing and posting invoices.

The billing worksheet compares the inception-to-date (ITD) billed amounts to the ITD cost incurred at actual or target rates. You must compute burden and revenue in the same period you are printing the billing worksheet to get your ITD cost incurred amounts.

You can print the worksheet for unposted and posted invoices. Data can be displayed at the summary or detail levels of the project. You also have options to print just the billing worksheet or include supporting schedules.

To access the new screen, click **Projects » Billing » Standard Bills Processing » Print Billing Worksheet**.

Note that this application is only for printing the billing worksheet, and no data is stored in a report table. Data is gathered from several database tables and calculated in real time.

One of these tables is BILL_EDIT_INVC_HDR. Aside from existing columns, three new columns added to this table are being used by Print Billing Worksheet:

- CALC_FY_CD
- CALC_PD_NO
- CALC_SUB_PD_NO

Costpoint uses these columns when printing the worksheet for standard bills, retroactive bills, reversing standard bills, and previously posted bills. These applications are also updated to support this enhancement:

- Calculate Standard Bills
- Calculate Retroactive Bills
- Reverse Previous Bills
- Post Standard Bills

Note: Only the following bill types can be included in the report:

- **ST**: Nonconsolidated standard bill
- **CR**: Consolidated standard/retroactive bill
- **VS**: Reversing standard bill
- **VC**: Reversing consolidated standard/retroactive bill

RT (nonconsolidated retroactive bill) and **VR** (reversing retroactive bill) types are not included. You can use the Print Retroactive Billing Worksheet to verify amounts for these bill types.

Managing Functional and Project Roles

Manage Functional Roles (SYMROLE)

You will now be able to manage and track functional roles in one central location in Costpoint. You can view these roles on just one screen, determine or search for roles that are applicable only to specific areas, and create new roles that can be used in multiple places within Costpoint.

On the new Manage Functional Roles screen, you can define functional roles and specify if these roles should be available for use in any or all of the following areas by selecting their corresponding check boxes:

- **Time & Expense domain**: If your version of Time & Expense is co-deployed with Costpoint, all functional roles with the **T&E** check box selected on this screen will be available on the Functional Roles (ADMFUNCTIONALROLE) screen in Time & Expense. The **Functional Role Code** and **Description** fields in Functional Roles (ADMFUNCTIONALROLE) will be read-only, and you will also not be able to delete or add records on that screen. All the other settings in Functional Roles, however, will still be editable.

  If you are using stand-alone Time & Expense deployments, the **T&E** check box setting in Manage Functional Roles will not have an effect on the Functional Roles screen in Time & Expense.

- **CRM & Contracts domain**: Roles with the **Contracts** check box selected will load on the Manage Contract Management Roles screen and will be available for selection on screens within the CRM & Contracts domain. The role code and description will be read-only, and you will not be able to delete or add records on that screen. You can, however, still mark if the role is applicable to employees, customers, competitors, contacts, and/or subcontractors.

- **Subcontractor Management module in the Projects domain**: Roles with the **Subcontractors** check box selected will load on the Manage Work Assignment Roles screen and can be used on screens within the Subcontractor Management module in the Projects domain. The role code and description will be read-only, and you will also not be able to delete or add records on that screen.

There are system-defined functional role codes in Manage Functional Roles, but you will be able to add new ones. You cannot delete system-defined codes. For user-added codes, you will not be able to delete a code that has the **T&E**, **Contracts**, and/or **Subcontractors** check box selected even if that code has not yet been used in any Costpoint application.

If you have existing roles in Contracts, Subcontractor Management, and T&E, these roles will be copied into the Manage Functional Roles screen when you upgrade to Costpoint 8.1, unless your T&E system is not co-deployed. This way, all roles you are currently using will continue to be available for your use. If you have a separate T&E instance, you will continue to add roles in T&E as you do currently. Roles in Contracts and Subcontract Management will be copied into Manage Functional Roles regardless of your T&E deployment.

If the role has already been used in a record and you clear the Costpoint area's check box, that role will display on the respective Roles screen, but the permissions on the respective Roles screen will be deleted and the record where it was used will not be affected. For example, if you clear the **Contracts** check box for a role that was used in Manage Opportunities, that role will display on the Manage Contract Management Roles screen, but no check boxes will be selected on the Manage Contract Management Roles screen and the opportunity record will not be affected.

To access this new application, click **Admin » System Administration » System Administration Controls » Manage Functional Roles**.

Attention: See related enhancements in the Time & Expense and Costpoint Business Intelligence sections of this document for more information.

Manage Project Roles (PJMROLE)

This new application is created to allow you to assign roles to projects and users within the projects. A role can be assigned to multiple projects, and a project can also be assigned multiple roles. Users can be assigned to multiple roles as well. You can apply the same roles to lower-level projects by selecting the **Apply to Lower Project Levels** check box for the desired role assignments.

All roles that have been set up on the Manage Functional Roles screen are available for selection in Manage Project Roles. Users that can be assigned to these roles, on the other hand, are only those that have been granted access to the company you are currently logged in to.

To open the new screen, click **Projects » Project Setup » Project Master » Manage Project Roles**. You can also access it through a hyperlink on the Basic Info tab of Manage Project User Flow.

Manage Project User Flow (PJMBASIC)

When you click the new **Project Roles** hyperlink added to the Basic Info tab, Costpoint opens the Manage Project Roles screen. If you have a project selected in Manage Project User Flow, that project defaults in Manage Project Roles, and you can view or assign roles to the project and users within that project. If a project manager with a corresponding employee ID is already assigned in Manage Project User Flow, that employee/user is also automatically loaded in Manage Project Roles.

You can choose to apply the same roles to lower-level projects by selecting the **Apply to Lower Project Levels** check box in Manage Project Roles. When you create lower-level projects in Manage Project User Flow, all role assignments with that check box selected for the project directly above the new projects being created will cascade to the new projects. This eliminates the need for you to manually assign project roles to each lower-level project in Manage Project Roles.

Mass Add Project Master Data (PJPMADD)

The **Project Roles** category has been added to the **Include** list box so you can include project role information when mass adding or updating multiple projects.

If lower-level projects are added using this application, project roles with the **Apply to Lower Project Levels** check box selected at the level above the new projects being created will automatically be assigned to the new projects, even if **Project Roles** was not selected in Mass Add Project Master Data.

> **Note:** If you mass add/update projects through the Project Initialization subtask of the Manage Opportunities or Manage Contracts screen, the same logic used in Mass Add Project Master Data applies: project role information will be copied from the template project into the destination project.

Import Project Master Data (PJPPREP)

You can now use this screen to import project role information from a comma-separated file into Costpoint. When you upload the file and run the application, Costpoint saves the data in the PROJ_ROLE_USER table.

The input file must be named PROJ_ROLE_USER.csv. Ensure that all columns have a value before you import the file into Costpoint. For more details on creating the input file, see the “Input File Information” topic under this application in the online help.

Manage Work Assignment Roles (SMMWROLE)

Role codes and descriptions that load on this screen now come from Manage Functional Roles. Only those roles that have the **Subcontractors** check box selected in Manage Functional Roles display in Manage Work Assignment Roles.

Role Code field length has increased from 10 to 15 characters, while **Role Description** has increased from 30 to 60 characters, for consistency with the field lengths used in Manage Functional Roles.

Since role management is now centralized in Manage Functional Roles, creation, deletion, and modification of role records in Manage Work Assignment Roles are no longer allowed.

Note: Upon your upgrade to Costpoint 8.1, the system will automatically migrate your existing roles in Manage Work Assignment Roles to Manage Functional Roles.

Manage Work Assignments (SMMWRK)

On the Roles subtask, the lookup of the **Role** field now displays the roles that have the **Subcontractors** check box selected on the Manage Functional Roles screen. The **Role Description** value corresponding to the selected **Role** also comes from Manage Functional Roles.

Manage Contract Management Roles (CTMROLES)

Role codes and descriptions that load on this screen now come from Manage Functional Roles. Only those roles that have the **Contracts** check box selected in Manage Functional Roles display in Manage Contract Management Roles.

Since role management is now centralized in Manage Functional Roles, creation, deletion, and modification of role records in Manage Contract Management Roles are no longer allowed. However, you can still mark roles as applicable to employees, customers, competitors, contacts, and/or subcontractors in Manage Contract Management Roles.

Note: Upon your upgrade to Costpoint 8.1, the system will automatically migrate your existing roles in Manage Contract Management Roles to Manage Functional Roles.

Expanded Role Code Field Length

Role Code field length (in the lookup of the **Role Description** field) has increased from 10 to 15 characters on the following screens for consistency with the **Role Code** field length in Manage Functional Roles:

- Manage Contracts (CTMCNTR)
- Manage Opportunities (CTMOPP)
- Opportunities Quick View (CTMOPPM)
- Manage Organizational Conflict of Interest (OCI) (CTMOCI)

Multicurrency Enhancement: Project Status Report in Billing Currency for Cost Only

If you are managing projects in the billing currency, this enhancement can help you properly accomplish the required local and country taxes and reporting.

Print Project Status Report (PJRPROJ)

This application now allows you to print the Project Status Report (PSR) in the billing currency for projects with a billing currency that is different from the functional currency.

The **Column Options** group box has been added to the screen with the following options:

- Functional Currency
- Billing Currency
- Both

You can choose to show columns in just the functional or billing currency, or to display both columns so you can validate values side by side. If you select **Billing Currency** or **Both**, new column options will be available for selection in **As Column 2–8**.

After the **Column Options** selection of **Billing Currency** or **Both** has been indicated, use the new **Billing Currency** field added to **Selection Ranges** to select at which billing currency you want to print the report. This should match the billing currency of the project selected.

Note: If printed in the billing currency, the PSR will only include costs; revenue will not be printed.

Compute Burden Costs (PJPALCST)

You now have the option to calculate burden costs for multicurrency projects. The following fields have been added to this screen:

- **Billing Currency Projects**: Select this check box to compute multicurrency costs and apply burden costs to the multicurrency amounts. If you select this check box, the application uses the exchange rate pulled from the specified **Rate Date** to compute for multicurrency amounts for projects with a billing currency that is different from the functional currency. If the billing and functional currencies are the same, the billing currency amounts will be equal to the functional amounts.
- **Rate Date**: This field is required when you select **Billing Currency Projects**. It defaults to the subperiod ending date of the selected accounting period, but you can select a different date. The rate date selected will be used to pull the correct exchange rate when calculating burden costs for projects with a billing currency that is different from the functional currency.

Applications Used for Posting

Previously, only functional amounts were posted to the PROJ_BILL_HS table when posting bills; amounts in the billing currency were only printed (not posted to the database table). Now, billing currency amounts are also stored in PROJ_BILL_HS so that inception-to-date (ITD) multicurrency billed amounts can be displayed in the PSR header.

The following applications have been updated to correctly populate the new multicurrency columns in PROJ_BILL_HS when posting bills:

- Post Standard Bills (BLPGEN)
- Post Manual Bills (BLPMANB)
- Post Milestone Percent Complete Bills (BLPMPCB)
- Post Project Product Bills (BLPPROJB)

Manage Project Bill Summary (BLMPBS)

The following columns are added to the Project Bill Summary Details table window. These columns display billed, retained, and withholding amounts in the billing currency.

- MU Billed Amount
- MU Retained Amount
- MU Withholding Amount
- MU Withholding Release Amount

If your Multicurrency license is off or if the functional and billing currencies are the same, these fields are equal to the **Billed Amount**, **Retained Amount**, **Withholding Amount**, and **Withholding Release Amount** columns on the screen.

Update Project Status Report Tables (PJPUPPSR)

This application is modified to insert/update multicurrency amounts in the new columns added to PSR_HDR and PSR_FINAL_DATA. These tables store the data used in printing the Project Status Report.

Update Prior Year History (PJPUPPY)

When the **Project Ledger** check box is selected on this screen, Costpoint will include the new multicurrency columns added to the PROJ_SUM and PROJ_BURD_SUM tables when updating prior year history.

Manage Prior Year Cost and Revenue (PJMPYCST)

You will now be able to view and enter amounts in the functional and billing currencies on this screen. New columns, **Functional** and **Billing**, have been added to the Details section. Previously, only functional amounts could be viewed/entered on this screen.

A new **Recalculate** button is also available. Click this button to recalculate the functional and billing amounts when the exchange rate has changed. You can modify or view exchange rate information on the new Exchange Rates subtask added to this screen.

Multi-User Report Printing

The Post Revenue application now allows multiple users to print the Revenue Journal at the same time. Similarly, multiple users can simultaneously print the Unit Usage Journal on the Post Unit Usage screen.

The posting process on both screens will remain a single-user functionality; however, the posting can be submitted by multiple users simultaneously. Costpoint will queue the posting/commitment transactions and process them one at a time.

Users will have only the option to **Print/Post Revenue** and **Print/Post Unit Usage** as the **Post Revenue** and **Post Unit Usage** options are no longer available. The reports generated from the Print/Post process will contain a unique sequencing number and should be retained if needed for historical purposes.

Project Long Name

A new project **Long Name** field has been added to the Details tab of the Manage Project User Flow screen. This enables you to enter a more in-depth description of the project so you can easily identify it. With up to 120 allowable characters, you can specify a complete description setup for each project, which will create more accurate charging and reporting for projects.

The **Project Name** value defaults in this field, but you can edit it. If the project is created from an opportunity, the opportunity name is the default value. If the project is initiated from a contract, the contract long name (if provided) or the contract name populates this field.

Long Name is required, so do not leave this field blank to avoid an error.

The following screens have also been modified in line with the change in Manage Project User Flow:

- **Import Project Master Data**: This application has been updated to include the new **Long Name** field value when importing data from a PROJ.csv file into Costpoint. Column 94 (PROJ_LONG_NAME) is added to the input file layout. If this column is not included in the input file or is left blank, the PROJ_NAME (**Project Name**) value defaults in this column.
- **Mass Add Project Master Data**: If you select the **Include Basic Info** check box on this screen, Costpoint now includes the new **Long Name** (PROJ_LONG_NAME) field value in the process of mass adding or updating projects.

  In the Details table window, a new **Destination Project Long Name** field is also added to store the long name of the destination project. The template project long name defaults in this field, but you can change it.

Attention: Related enhancements have been made to the CRM & Contracts domain. For more details, see the Contract Long Name section of this document.

Planning

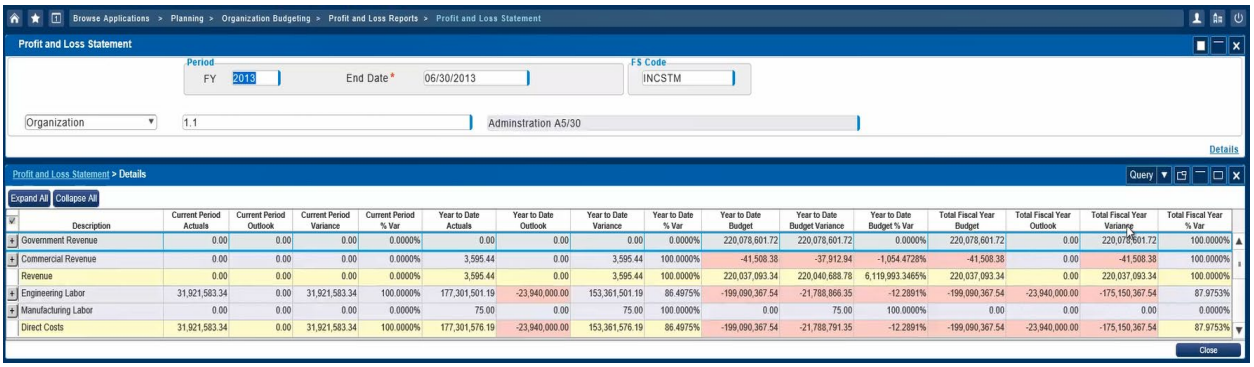
This section describes version 8.1 enhancements for Costpoint Planning.

Organization Budgeting Reports Enhancements

Profit and Loss Statement Report Added

For this release, a new Profit and Loss Statement report was added to Organization Budgeting. This report displays the standard view Profit & Loss by Organization with separate columns for Actuals vs Budget vs Variance. The report format is based on the Financial Statement Code selected in the **FS Code** field. You can select to run the report by Organization or Reorganization.

To view the report, click **Organization Budgeting » Profit and Loss Reports » Profit and Loss Statement.**



The following table contains the columns and descriptions for the Profit and Loss Statement grid.

Column	Description
Description	This column displays the name of the Org and the GL account.
Current Period Actuals	This column displays the actual posted GL transactions for period end date.
Current Period Outlook	This column displays the last approved outlook for the last closed period.
Current Period Variance	This column displays the Variance Actuals to Outlook or Outlook to Actuals per configuration selection.
Current Period % Var	This column displays the % Var Actuals to Outlook or Outlook to Actuals per configuration selection.
Year to Date Actuals	This column displays the actual Year to Date GL posted transactions.
Year to Date Outlook	This column displays the last approved Outlook Year to Date up to the last closed period.

Column	Description
Year to Date Variance	This column displays the Variance Actuals to Outlook or Outlook to Actuals per configuration selection.
Year to Date % Var	This column displays the % Var Actuals to Outlook or Outlook to Actuals per configuration selection.
Year to Date Budget	This column displays the last Committed Budget Year to Date through end period.
Year to Date Budget Variance	This column displays the Variance and Actuals to Budget or Budget to Actuals per configuration selection.
Year to Date Budget % Var	This column displays the % Var Actuals to Budget or Budget to Actuals per configuration selection.
Total Fiscal Year Budget	This columns displays the last Committed Budget through fiscal year.
Total Fiscal Year Outlook	This column displays the last approved Outlook for fiscal year.
Total Fiscal Year Variance	This column displays the Variance Budget to Outlook or Outlook to Budget per configuration selection.
Total Fiscal Year % Var	This column displays the % Var Budget to Outlook or Outlook to Budget per configuration selection.

Additionally, please note the following conditions:

- You can drill down to lower Org levels and to the GL account details regardless of the Org level chosen to run the report.
- The variances follow the **Report Variance Calculation in favor of** setting on the Display tab of the **Planning » Administration » Administration Controls » Configuration Settings** screen. For example, if the report variance is selected as:
  - **Actuals:** The variance is negative if the Actual Cost, Revenue, or Profit is lower than Budgeted Cost.
  - **Budgets:** The variance is positive if the Actual Cost, Revenue, or Profit is higher than Budgeted Cost.

Reorganization Option Added to Org Budgeting Reports

Org Budgeting Reports were enhanced to include a **Report By** drop-down list, where you can select to run the report by **Organization** or **Reorganization**.

Modified reports include the following:

- Profit and Loss by Organization
- Profit and Loss by Account
- Profit and Loss by Project
- Profit and Loss Statement

- Utilization Analysis
- Budget/Outlook Resource Schedule

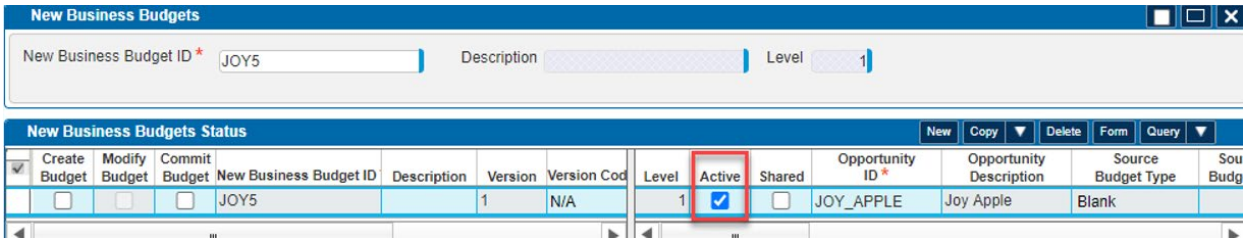
In line with this enhancement, the **Use Reorg Structure** option on the Integration Tab of Configuration Settings was removed.

New Business Budget Enhancements

Active Flag Added to New Business Budgets

For this release, an “Active” flag/column was added to New Business Budgets Status table. This Active flag is based on the New Business Budget ID. The changes you make to the Active flag will cascade down to the lower level budgets.

- If one version of the budget is inactive, all versions of the budget and the lower level budgets also become inactive.
- If the parent budget is inactive, a child cannot be active. The New Business Budget ID may not be set to active when the parent budget is not active
- If the top level WBS is made inactive, all levels are also made inactive. If a second level WBS is made inactive, then lower levels are also made inactive, and so on.



By default, the Active column is selected. But when the column is cleared, it becomes “Inactive,” which automatically removes the New Business Budget from any integration with Org Budget/Outlooks or Budget by Resource screens. This action applies whether it is shared or not shared.

If the New Business Budget ID is inactive, the **Create Budget**, **Modify Budget**, and **Commit Budget** check boxes will be disabled. It is also important to note that an inactive New Business Budget cannot be edited.

New Business Budget Reports were modified to add an option to include inactive NBBs. When this option is not selected, the report will only get the active budgets.

Inactive New Business Budgets Removed from CER Reporting Tables

When the New Business Budget ID is set to inactive, the new business budget is removed from the (eREPORT_PROJ_TREND and eREPORT_PROJ_DETAILS) CER reporting tables.

Only “Active” budgets will be imported. This also affects any new business budget report and Org budget uploads.

Earned Value Enhancements

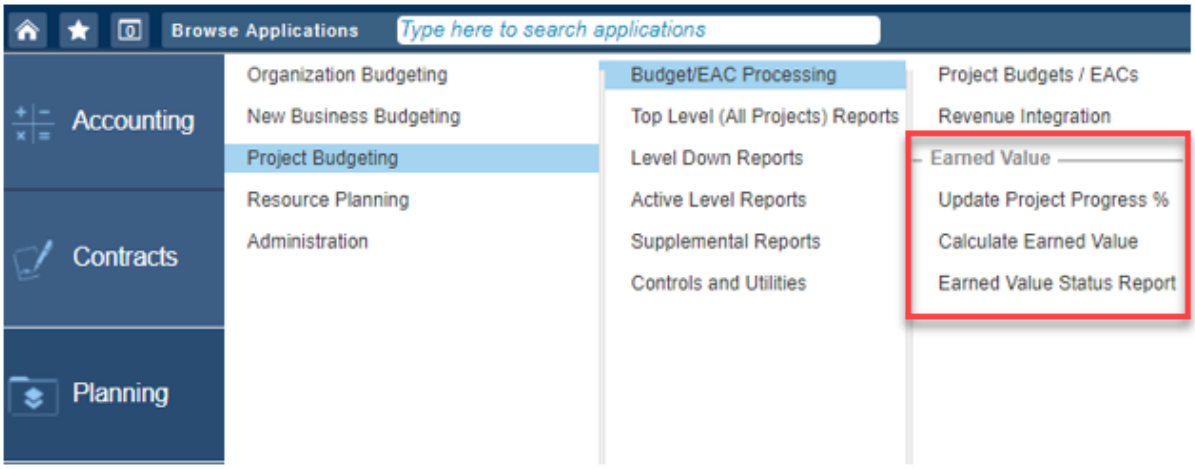
Earned Value Applications Added to Project Budgeting

Earned value analysis helps project managers to measure project performance and create project forecasting. It is used to find variances in projects based on the comparison of work performed and work planned.

Previously, there was no Earned Value (EV) functionality available in Planning, and this issue has been addressed.

For this release, three new earned value applications were added to the Project Budgeting menu. Users can now update project progress %, calculate earned value, and view an EV status report.

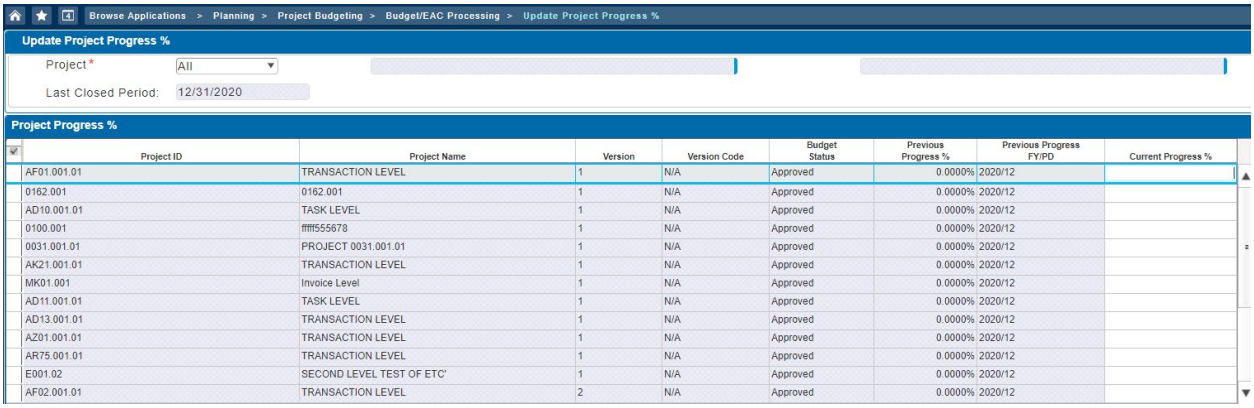
To view these three new EV applications, click **Planning » Project Budgeting » Budget/EAC Processing.**



Update Project Progress %

A new application called Update Project Progress % was added to the Earned Value menu.

Use this application to update Project Progress %, and the result set displayed will be final version Project Budgets only and not EACs.



Project ID	Project Name	Version	Version Code	Budget Status	Previous Progress %	Previous Progress FY/PD	Current Progress %
AF01.001.01	TRANSACTION LEVEL	1	N/A	Approved	0.0000%	2020/12	
0162.001	0162.001	1	N/A	Approved	0.0000%	2020/12	
AD10.001.01	TASK LEVEL	1	N/A	Approved	0.0000%	2020/12	
0100.001	ffffff555678	1	N/A	Approved	0.0000%	2020/12	
0031.001.01	PROJECT 0031.001.01	1	N/A	Approved	0.0000%	2020/12	
AK21.001.01	TRANSACTION LEVEL	1	N/A	Approved	0.0000%	2020/12	
MK01.001	Invoice Level	1	N/A	Approved	0.0000%	2020/12	
AD11.001.01	TASK LEVEL	1	N/A	Approved	0.0000%	2020/12	
AD13.001.01	TRANSACTION LEVEL	1	N/A	Approved	0.0000%	2020/12	
AZ01.001.01	TRANSACTION LEVEL	1	N/A	Approved	0.0000%	2020/12	
AR75.001.01	TRANSACTION LEVEL	1	N/A	Approved	0.0000%	2020/12	
E001.02	SECOND LEVEL TEST OF ETC'	1	N/A	Approved	0.0000%	2020/12	
AF02.001.01	TRANSACTION LEVEL	2	N/A	Approved	0.0000%	2020/12	

To update the project progress %:

1. Click **Planning » Project Budgeting » Budget/EAC Processing » Update Project Progress %**.
2. In the **Projects** field, select **All**, **One** or **Range**. When you select **All**, all budget-level, final version project budgets will populate the result set.

   The **Last Closed Period** defaults to the last closed period end date.
3. Click **Execute** to populate the result set with Final Version Budgets.

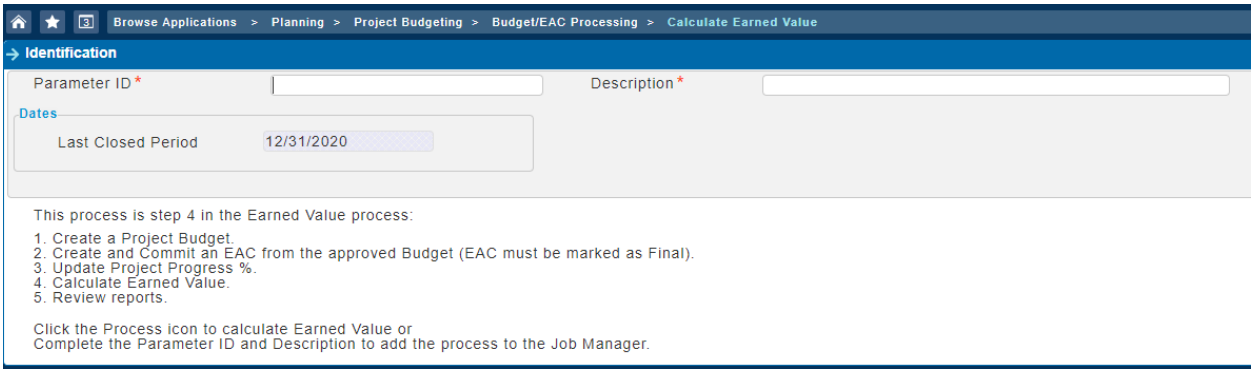
   The previously saved Progress % displays with the FY/PD when it is run.
4. Enter the percentage in the **Current Progress %** column for those budgets you wish to calculate earned value. Once you save the percentage, it will update the percentage progress for the period.
5. Click **Save**.

   Results are saved to a new table. The results will be accessible from Business Intelligence.

Calculate Earned Value

Use this application to calculate earned value that will be used for the Earned Value Status Report. Calculations are done and saved for the Active Level final budgets only. The results are saved in a Planning table that is accessible from Business Intelligence.

The Date defaults to the last closed period which is the same period as % update.



To calculate earned value:

1. Click **Planning » Project Budgeting » Budget/EAC Processing » Calculate Earned Value**.
2. Create and save the **Parameter ID** and **Description** if you want to run the app from the Job Manager.

   The Last Closed Period displays. This is not editable.
3. Click the **Process** icon to calculate the earned value.

Earned Value Status Report

Use this report to view all calculations done for active-level projects. The report pulls from the table created in the Calculate Earned Value application for the active-level budgets. The **Last Closed Period** in the report parameters defaults to the last closed period and is not editable.

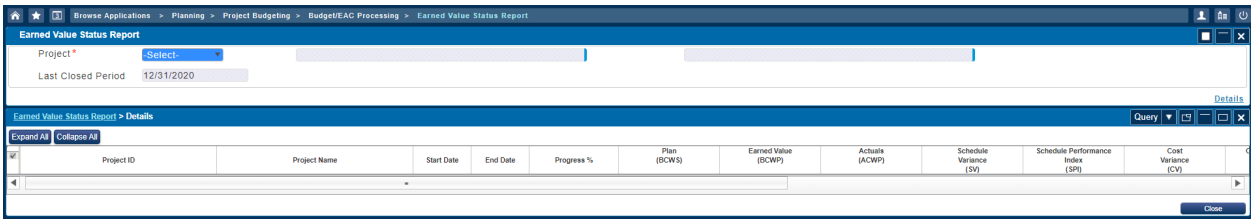
When you select a project, all active-level, final version budgets, not EACs, will be displayed.

After you select a project, the top-level budgets populate the result set. You can drill down to view the active-level budget/s under that top level.

The Start and End date on the active-level rows are from the Project Budget Period of Performance.

The **Progress %** comes from the Update Project Progress % application, which should be updated before this report is run for the last closed period.

The Estimate at Completion (EAC) comes from the latest run Project EAC.



Employee Requisitions Added to Advanced Search Functionality

The Advanced Search functionality has been updated to include an employee requisition feature which allows you to place a request for new employees if none of the current employee records in Costpoint meet the search criteria you entered. This new feature is available when you access the Advanced Search subtask on the New Business Budgets application.

Creating an employee requisition requires you to create a job template which will be prepopulated with the search criteria that you entered. Once you create the requisition, the record displays on the Resources table. You can then select the record and click **Add Resources** to add the requisition to the budget.

Employee requisitions included in a budget display on the Hours subtask on the New Business Budgets screen with **Employee Req** as its **ID Type**, and the **Job Template ID** as the employee **ID**. Once an employee is hired, the **ID Type** changes to **Employee** and the **ID** field will be populated with the new employee's actual ID number.

If you are licensed for Deltek Talent Management (DTM), you can forward the requisition to DTM, which then can begin the search or hiring process.

Create Employee Requisitions from the New Business Budgets Screen

The Employee Requisition subtask has been added to the Advanced Search subtask. Use the Employee Requisition subtask to enter preliminary details for the job template that will be created for the requisition.

The Employee Requisition subtask contains the following fields:

Field	Description
Job Template ID	This field displays the job template identification number. When you click the **Create Employee Req** button, this field is automatically populated. The system-generated ID that displays is a link to the Manage Job Templates screen.
Detail Job Title	Enter, or click to select, the code for the detail job title for the job template.
Detail Job Title Description / Job Title	This field displays the job title for the job template. This field is automatically populated with the description assigned to the specified Detail Job Title.

Field	Description
Organization	Enter, or click to select, the organization for this job template. The description of the organization displays to the right of this field. The organization that you enter in this field will also default into the **Security Organization** field on the Job Details tab of the Manage Job Templates screen.
HR Organization	Enter, or click to select, the HR Organization that applies to this job template.
Taxable Entity	Enter, or click to select, the taxable entity for the job template.
Number of Openings	Enter the number of employees to be hired under the requisition.
Worker's Compensation	This field displays the default Worker's Compensation Code to be used for this employee for normal timesheet entry lines. The value of this field defaults to the value of the **Workers' Compensation** field in Configure Labor Settings.
Compensation Plan	This field displays the compensation plan for the job template. Upon assignment of the plan to the employee, Costpoint checks the Compensation Plans table and validates that there is a salary range in effect for this plan and the effective date of the record. **Note:** You can enter compensation plans on the Manage Compensation Plans screen in Costpoint People.
Step	If you specified a Step-type Compensation Plan, this field displays the step that applies to this job template.
Employee Type	This field displays the position type of the employee. Valid values are: ▪ **Full-time** ▪ **Part-time** ▪ **Temporary**
Rate Type	This field displays the classification for the job template. Valid values are: ▪ **Hourly**: The employee is paid on an hourly basis. The employee's labor cost always reflects the number of hours worked multiplied by the hourly rate of pay. Hourly employees can charge overtime pay types, and the labor costs reflect this. ▪ **Salaried Fixed Hours**: The employee is paid the same amount each pay period, regardless of the number of hours worked. Employees in this category cannot charge overtime pay types unless you selected the

Field	Description
	Allow Overtime for Salaried - FLSA Exempt Employees check box on the Overtime Settings subtask of the Configure Labor Settings screen and the pay type being charged has the **Salaried** check box selected in the Employee Eligibility group box on the Manage Pay Types screen. ▪ **Salaried Fluctuating Hours**: The employee is paid a salary, but the number of hours worked in a week fluctuates, so the salary amount is affected by the number of hours worked. If the employee is not exempt from FLSA, overtime is paid for hours worked in excess of 40 hours per week, at one and one-half times the basic rate.
Timesheet Cycle	If a value exists in the **Default Timesheet Cycle** field on the Configure Labor Settings screen, that value loads in this field.
Leave Cycle	If a value exists in the **Default Leave Cycle** field on the Configure Leave Settings screen, that value loads in this field.
Pay Cycle	If a value exists in the **Default Pay Cycle** field on the Configure Payroll Settings screen, that value loads in this field.

The Employee Requisition subtask also contains the following buttons:

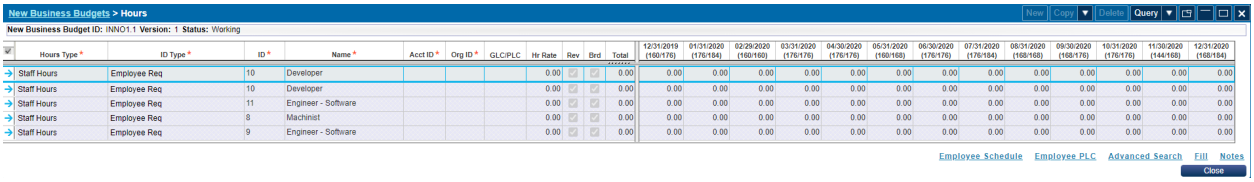
Button	Description
Reset	Click this button to clear all fields on the subtask.
Create Employee Req	Click this button to proceed with the creation of the employee requisition.

When you click the **Create Employee Req** button, the details you entered will be forwarded to the Manage Job Templates screen and a new job template will be created.

The **Auto Load Employee Req** button has also been added to the Resources subtask to enable you to display all requisitions created for a new business budget. You must click the **Auto Load Employee Req** button first before you can add employee requisitions to a budget.

Once all requisitions are displayed, select the relevant records and click the **Add Resources** button to include the requisition to a budget. You can view the added requisitions on the Hours subtask.

Employee requisitions included in a budget have **Employee Req** as its **ID Type**, the **Job Template ID** as the employee **ID**, and the **Detail Job Title** as the employee **Name**.



Once an employee is hired, their **ID Type** changes to **Employee**, the **ID** field will be populated with the new employee's actual ID number, and the **Name** field will be changed to the employee's name.

Job Templates and the Hiring Process

Once you create employee requisitions on the New Business Budgets screen, you can view or modify its corresponding job template on the Manage Job Templates screen.

Some of the fields on the Manage Job Templates screen are populated with the search criteria you entered on the Advanced Search and Employee Requisitions subtasks. When you have finalized the job template details, you can export the template details to DTM using the Transfer Talent Management Data screen. Once the necessary hiring steps have been done in DTM, use the Transfer Talent Management Data screen to import employee information from DTM into Costpoint.

The job template and the employee details will be updated on the Manage Job Templates and New Business Budgets screens when you hire an employee that matches the requisition criteria.

For more information, refer to Employee Requisition Integration with Deltek Talent Management and Budgeting & Planning.

Updates to the Refresh Process

Due to improved integration between Planning and Costpoint, the majority of backend tables used in Planning now pull data directly from Costpoint. Therefore, these table no longer require updating through the refresh process.

Tables that still require updating from **Planning » Administration » Administration Utilities » Report Table Update Process** include:

- Business Intelligence (BI) report tables.
- Custom report tables
- Project security tables

Since fewer tables require updating, the processing time is significantly reduced.

Note that as part of this update, the application was renamed to “Report Table Update Process,” and a Log table that displays processing details was also added to the screen.

Enhanced KBD Details

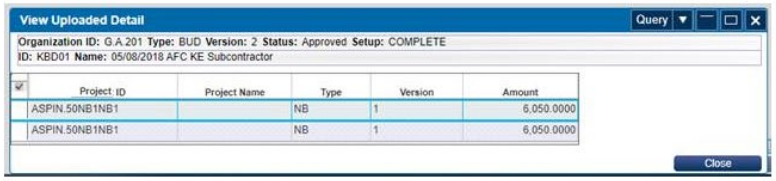
Project ID and Keyboard (KBD) Details Added to the Import Code for Non-Labor Entries

Previously, when users were integrating Project and Org budgets, the keyboard details (KBD) for Non-Labor entries were displayed in summarized versions.

For this release, users can now view the details of the KBD entries when imported into the Organization Budgets. When viewing the org budgets/outlooks, the KBD entries are displayed on a separate row.

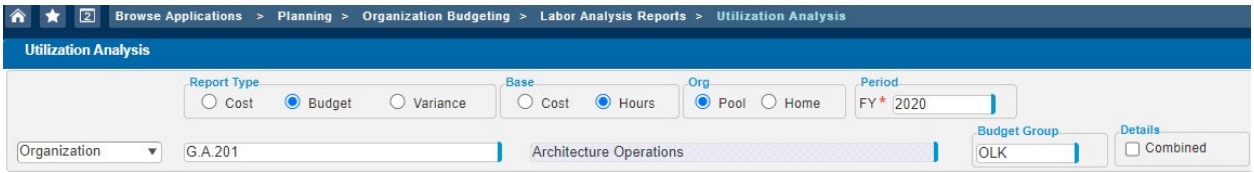
When the ID, Account, and Org are the same in multiple Project Budgets/EACs, they populate the Org Budget in one summarized row.

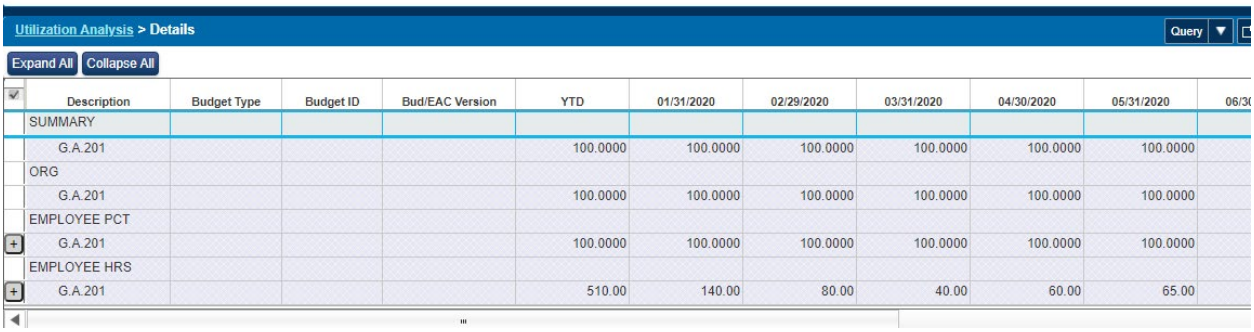
A new subtask was added to the Non Labor Dollar budget screen. Click the View Uploaded Detail subtask to display the Proj ID, Proj Name, Proj Type, and Version details of the highlighted Non Labor Dollar row. The Project Upload History will be removed when the Budget or Outlook OLK is deleted.



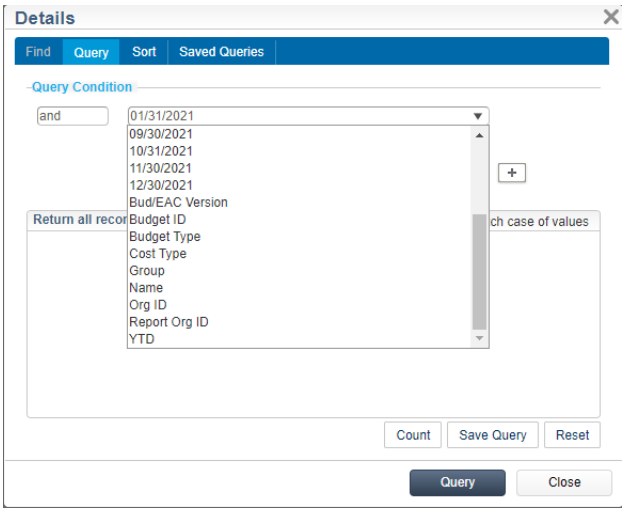
Project ID and Keyboard (KBD) Details Added to Org Reports

Previously, the KBD entries for the **Utilization Analysis**, **Labor Hours Analysis**, and **Labor Cost Analysis** reports were combined into one row. For this release, these org reports were enhanced to display the KBD entries on separate rows and include the Project ID, Budget Type, and Bud/EAC version information.





The **Details » Query** options were also updated to include Budget ID, Bud/EAC Version, and Budget Type.


Details
Find
Query
Sort
Saved Queries
Query Condition
and
01/31/2021
09/30/2021
10/31/2021
11/30/2021
12/30/2021
Bud/EAC Version
Budget ID
Budget Type
Cost Type
Group
Name
Org ID
Report Org ID
YTD
Return all recor
ch case of values
Count
Save Query
Reset
Query
Close

People/Regulatory

Add, Change, and Delete Employee Information in Team Management

Team managers can now add, change, and delete data in the Company Property, Phone/Email, and Address applications of the Team Management module. In a previous enhancement, the ability to add, change, and delete data was added to the Emergency Contacts screen only. This current enhancement extends that ability to the other applications.

The options on the Configure Team Management Settings screen will either require Human Resources (HR) approval for changes or not. If HR approval is required, the changes will be added to a holding table until such time that the HR manager approves/activates them. If HR approval is not required, the changes made in these applications will be updated directly to the applicable Employee tables. If your company does not wish to allow the managers to make any changes, you must change module/application rights to “Read-Only” through system security.

Manage Change Requests (HTMCHANGES)

The screen provides the following new field and option:

Field	Description
Changed	This field displays a value of **X** if the value in the **Change Request Value** field is different from that in the **Original Value** field.
Reject	Select this check box to change the status of all pending change requests in the subtask to **Rejected**.

The application now displays change requests for the following employee information:

- Email
- Phone
- Address
- Additional addresses
- Company property

Activate Pending Change Requests (HTPCHANGES)

You can now use the following check boxes which were previously disabled in the **Applications** group box:

Field	Description
Additional Addresses	Select this check box to update the changes made to the Additional Addresses subtask on the Address screen for the selected employees.

Field	Description
Address	Select this check box to update the changes made to the Address screen for the selected employees.
Company Property	Select this check box to update the changes made on the Company Property screen for the selected employees.
Email	Select this check box to update the changes made in the Email table for the selected employees.
Phone	Select this check box to update the changes made in the Phone/Email application for the selected employees.

The existing **All** check box was removed in this release.

Company Property (HTMPROPERTY)

The application allows managers to add, change, or delete data. The following are screen updates to support the new functionality:

- The header now includes the following field:

Field	Description
Status	This field on the header displays the employee's status.

- The Company Property subtask provides the following fields:

Field	Description
Item	Enter, or click to select, the item code that is assigned to the employee.
Item Description	This field displays the description of the item that is assigned to the employee. This field was previously labeled as "Item."
Change Request Action	This field displays the type of action completed for the change request.
Change Request Status	This field displays the status for the change request, if applicable.
Status Date	This field displays the change request status date.
Notes	This editable field displays the comments made by the human resources manager and manager.

Phone/Email (HTMPHONE)

The application allows managers to add, change, or delete phone and email data. The following are screen updates to support the new functionality:

- The header now includes the following field:

Field	Description
Status	This field on the header displays the employee's status.

- The screen provides a new **Email** group box with the following fields:

Field	Description
Work Email	Enter the employee's work email address.
Home Email	Enter the employee's home email address.

- The screen provides a new **Change Request Information** group box with the following fields:

Field	Description
Change Request Action	This field displays the type of action completed for the change request.
Change Request Status	This field displays the status for the change request, if applicable.
Status Date	This field displays the change request status date.
Notes	This editable field displays the comments made by the human resources manager and manager.

- The **Phone Numbers** subtask provides the following new fields:

Field	Description
Change Request Action	This field displays the type of action completed for the change request.
Change Request Status	This field displays the status for the change request, if applicable.
Status Date	This field displays the change request status date.
Notes	This editable field displays the comments made by the human resources manager and manager.

Address (HTMADDRESS)

The application allows managers to add, change, or delete data for the home address of employees and other addresses. The following are screen updates to support the new functionality:

- The header now includes the following field:

Field	Description
Status	This field displays the employee's status.

- The screen provides a new **Change Request Information** group box with the following fields for the home address:

Field	Description
Status	This field displays the status for the change request, if applicable.
Status Date	This field displays the change request status date.
Notes	This editable field displays the comments made by the human resources manager and manager.

- The Other Addresses subtask provides the following new fields:

Field	Description
Change Request Action	This field displays the type of action completed for the change request.
Change Request Status	This field displays the status for the change request, if applicable.
Status Date	This field displays the change request status date.
Notes	This editable field displays the comments made by the human resources manager and manager.

Allow Multiple Users to Print/Compute Leave Accruals

Multiple users can now print on the Compute Leave Accruals screen at the same time. Prior to this release, only a single user can run the application at a given time.

Note: The Print/Process action is always scheduled through Job Server. The Process action has been removed.

Allow Multiple Users to Import Employee Data

Multiple users can now print on the Import Employee Data screen at the same time. Prior to this release, only a single user can run the application at a given time.

Note: The Print/Process action is always scheduled through Job Server. The Process action has been removed.

Allow Multiple Users to Import Timesheets

Multiple users can now print on the Import Timesheets screen at the same time. Prior to this release, only a single user can run the application at a given time.

> **Note:** The Print/Process action is always scheduled through Job Server. The Process action has been removed.

Allow Multiple Users to Import Timesheets from Deltek Time and Expense

Multiple users can now print the Import Timesheets from Deltek Time and Expense screen at the same time. Prior to this release, only a single user can run the application at a given time.

> **Note:** The Print/Process action is always scheduled through Job Server. The Process action has been removed.

Employee Requisition Integration with Deltek Talent Management and Budgeting & Planning

Costpoint adds the ability to integrate Costpoint employee requisitions with Deltek Talent Management as part of the existing integration.

Costpoint provides a new **Requisition Number** field that allows you to indicate the requisition under which the employee is hired. The **Requisition Number** field is populated by the Transfer Talent Management Data screen and is always disabled. You can access the field on the following screens if you have the corresponding license:

- **Manage Employee Information**: The Requisition Number is only visible on the Manage Employee Information screen if you have a Deltek Talent Management license.
- **Manage Job Templates**: The Requisition Number is only visible on the Manage Job Templates screen if you have a Costpoint Planning license.

When a job requisition number has been added on an employee salary record by importing the employee data through the Transfer Talent Management Data screen, the system would update the Costpoint requisition with the employee ID and change the requisition status to **Filled**. The filling of the requisition will cascade the employee to the appropriate opportunities, contracts, and budgets assigned to the requisition.

Configure Personnel Settings (HPMSET)

The following fields were transferred from the Configure Personnel Settings screen to the Configure Labor Settings screen.

- **Auto-Approve Position Requisitions** check box
- **Require Organization ID (Talent Management**) check box
- **Job Template Numbering Method** option
- **Default Requisition Approver** field

Configure Labor Settings (LDMLABOR)

The following fields were transferred from the Configure Personnel Settings screen to the Configure Labor Settings screen.

- **Auto-Approve Position Requisitions** check box
- **Require Organization ID (Talent Management**) check box
- **Job Template Numbering Method** option
- **Default Requisition Approver** field

The following columns were transferred to the LAB_SETTINGS table:

- S_RQ_NO_MTHD_CD
- REQ_AUTO_APPRV_FL
- APPRVL_EMPL_ID
- ORG_REQ_FL

Approve Position Requisitions (HPMAREQ)

You can now access the Approve Position Requisitions screen in the Employee module under a new submenu, Position Requisitions. This update allows you to approve job requisitions without a Costpoint Human Resources (HR) license.

In order to correctly default approvers and approve employees for requisitions on the Approve Position Requisitions screen, this Costpoint release changes the references for the fields from the Configure Personnel Settings screen to the Configure Labor Settings screen:

- S_RQ_NO_MTHD_CD
- REQ_AUTO_APPRV_FL
- APPRVL_EMPL_ID
- ORG_REQ_FL

The application allows you to assign multiple employees to one job template in order to better track data sent from Deltek Talent Management as well as to better understand the company's labor requirements. To support this functionality, the application now features the following:

- A new Employees subtask displays all employees that are assigned to a Job Template/Requisition. It also displays any employees who have previously been assigned to this Job Requisition. You can also assign the employees on this subtask or in Deltek Talent Management.

  The subtask provides the following employee information:

Field	Description
Employee	Enter, or click to select, an employee to assign to this job requisition.
Name	This field displays the last and first name of the selected employee.

Field	Description
Employee Requisition ID	This field displays the Employee Requisition ID that was assigned through the Transfer Talent Management Data process. If an employee is assigned to a requisition through this screen, the field will be blank.

- The screen provides the following new fields and options:

Field	Description
Number of Openings	This field displays the number of openings required to fill this job requisition.
New Business Budget ID	Enter the New Business Budget ID for the job template/requisition. You can manually enter a value in this field or automatically through the Deltek Planning module's Advanced Search screen in the Project Budges/EACs, New Business Budgets, and Budget by Resource applications.
New Business Budget Description	This field displays the description for the New Business Budget ID.
Partially Filled (Multiple Openings)	Select this job request approval status option if the job request has been partially filled.

Manage Position Requisition Approvers (HPMREQA)

You can access the Manage Position Requisition Approvers screen in the Employee module under a new submenu, Position Requisitions. This update allows you to manage job requisitions without a Costpoint HR license.

Manage Job Templates (HPMREQR)

The application provides the following updates:

- In order for the application to determine the Job Template Numbering Method and if an Organization ID is required, this Costpoint release updates references for the fields from H_PER_ADM_SETTINGS table to the LAB_SETTINGS table:
  - S_RQ_NO_MTHD_CD
  - REQ_AUTO_APPRV_FL
  - APPRVL_EMPL_ID
  - ORG_REQ_FL
- You can now access the Requisition Details tab without an HR license in order to manage the requisition information for Deltek Talent Management.
- The application provides a new Employees subtask, which displays employees assigned to a job template. You can use this subtask to better track data sent from Deltek Talent Management as well as to better understand the company's labor requirements.

The Employees subtask has the following fields:

Field	Description
Employee	This field displays the employee assigned to this job requisition.
Name	This field displays the last and first name of the selected employee.
Employee Requisition ID	This field displays the Employee Requisition ID that was assigned through the Transfer Talent Management Data process. If an employee is assigned to a requisition through Approve Position Requisitions, the field will be blank.

The subtask is disabled. Employees can either be assigned on Costpoint's Approve Position Requisitions screen or in Deltek Talent Management.

- If you are a Human Resources administrator whose company uses the Planning module, you will be able to edit the criteria from the Planning Advanced Search screen in the job template in order to ensure that job candidates have the correct background for the project. To support this functionality, the following fields were added/updated on the Job Details tab:

Field	Description
ITAR Status	From the drop-down list, select the ITAR status that is required for the job template/requisition. Valid options are: ▪ U.S. Person Authorized for ITAR ▪ Foreign Person with U.S. Dept of State Authorization/Special Exemption ▪ Not Authorized ▪ Not Applicable This field can be manually populated on this screen or automatically through the Deltek Planning module's Advanced Search screen in the Project Budges/EACs, New Business Budgets, and Budget by Resource applications
Security Clearance Level	Enter the security clearance level that is required for the job template/requisition. This field can be manually populated on this screen or automatically through the Deltek Planning module's Advanced Search screen in the Project Budgets/EACs, New Business Budgets, and Budget by Resource applications.
U.S. Citizenship	Select this check box if U.S. Citizenship is required for the job template/requisition This field can be manually populated on this screen or automatically through the Deltek Planning module's Advanced Search screen in the Project Budgets/EACs, New Business Budgets, and Budget by Resource applications.

- The Requisition Details tab provides the following new/updated fields to support the functionality:

Field	Description
Requested By	If you are using this screen to track position descriptions requisitions, you may enter, or click to select, the employee ID of the person initiating this requisition.
Number of Openings	This field displays the number of openings required to fill this job requisition.
New Business Budget ID	Enter the New Business Budget ID for the job template/requisition. You can manually enter a value in this field or automatically through the Deltek Planning module's Advanced Search screen in the Project Budges/EACs, New Business Budgets, and Budget by Resource applications. **Note:** This field is only available for Costpoint users with a Planning license.
New Business Budget Description	This field displays the description for the selected New Business Budget ID.
Status - Partially Filled (Multiple Openings)	The **Status** field displays a new approval status, **Partially Filled (Multiple Openings)**. This status is applicable when the required number of openings for a job request has not been fulfilled.

- A new Job Responsibilities tab allows you enter a description of the job responsibilities, which will be exported to Deltek Talent Management as part of the Job Template/Requisition.
- A new Degrees/Credentials subtask allows you to enter any degrees needed for an employee to fulfill the job requirement. Use this subtask to better understand and track the type of educational background to look for when you hire employees.

Field	Description
Degree	Enter any degrees or credentials that are required for the job template/requisition. This field can be manually populated on this screen or automatically through the Deltek Planning module's Advanced Search screen in the Project Budges/EACs, New Business Budgets, and Budget by Resource applications
Degree Description	This field displays the associated degree/credential description for the entered degree code.
Notes	Enter any notes about the degree. For example, "This degree is suggested but not required for applicants."

- A new Skills subtask allows you to enter the necessary skills for an employee to fulfill the Job Template requirements. Use this to better understand and track what type of skills to look for when you hire employees.

The Skills subtask has the following fields:

Field	Description
Skill	Enter any skills that are required for the job template/requisition. This field can be manually populated on this screen or automatically through the Deltek Planning module's Advanced Search screen in the Project Budges/EACs, New Business Budgets, and Budget by Resource applications
Skill Description	This field displays the description for the entered skill code.
Notes	Enter any notes about the skill. For example, "This skill is good to have but not required for applicants."

Set Up Company (SYPCOMP)

You can now create a new company's control files by including the new fields on the Configure Labor Settings screen and any default values associated with them in order to successfully set up a new company.

Manage Employee Salary Information (LDMEHIS)

You can now view the requisition number in the employee's salary record. The application provides the following field:

Field	Description
Requisition Number	This field displays the requisition number that applies to the employee. This field is disabled and is only visible if you have a Deltek Talent Management license. The Transfer Talent Management Data screen populates this field.

Manage Employee Information (LDMEINFO)

You can now view the requisition number in the employee's salary record. The Salary Details subtask provides the following field:

Field	Description
Requisition Number	This field displays the requisition number that applies to the employee. This field is disabled and is only visible if you have a Deltek Talent Management license. The Transfer Talent Management Data screen populates this field.

When a new employee has been hired and assigned to a job requisition, if applicable, Costpoint replaces the employee requisition ID with the employee ID in the Planning module's budget line that corresponds with the employee requisition number. The purpose of this is to determine actual costs for the budget.

View Salary Information and History (PRQEHIS)

You can now view the requisition number in the Costpoint audit table record. The application gives you information when the data was added as well as the employee who ran the process. The application provides the following field:

Field	Description
Requisition Number	This field displays the requisition number that applies to the employee. This field is disabled and is only visible if you have a Deltek Talent Management license. The Transfer Talent Management Data screen populates this field.

Transfer Talent Management Data (EMPHRSDAT)

The application provides the following updates:

- You can export Job Requisition information from Costpoint to Deltek Talent Management in order to be able to use that information to hire/onboard new employees. The label of the existing check box changed from “Job Templates” to “Job Templates/Requisitions.”

When you run the application with the **Job Templates/Requisitions** check box selected, the process updates the following Deltek Talent Management fields:

- Job Title
- Job Type
- Job Description
- Organizational Unit
- Location
- Recruiter
- # of Hires Needed
- You will be able to import from Deltek Talent Management to Costpoint the job requisition number under which an employee was hired and insert it into the employee salary record in order to link the employee record to the job template/requisition.

If the requisition number exists in the employee data being sent from Deltek Talent Management, Costpoint verifies the following:

- The number exists in the Job Template table.
- The system date is not less than the requisition date.
- The requisition does not have an approval status of **Disapproved**.
- The requisition still has open positions. This means that the **Number of Openings** field value is greater than the number of employees already assigned on the Employee subtask.
- A detail job title is associated with the requisition.

If the data does not meet all criteria, the application creates an employee record without a requisition number.

ESS Benefit Premiums Based on Pay Cycle Settings

Previously, premiums on the Life Events/New Hires screen and Benefits Enrollment screen were based on the following:

- **Biweekly Pay Periods**: Based on Biweekly Deduction Calculation Method in Configure Benefit Settings
- **Weekly Pay Periods**: Based on Weekly Deduction Calculation Method in Configure Benefit Settings
- **Monthly Pay Periods**: Based on 12 pay periods
- **Semi-Monthly Pay Periods**: Based on 24 pay periods

The premium in this setup was based on the number of pay periods in a year. This was an issue if you want premiums to be based on the number of checks in a year. In addition, some years had an extra check date, and that extra check date needs to be considered when determining the premium amount.

To address these issues, Costpoint now bases the benefit (non-FSA/HSA) premium amounts in ESS Life Events and ESS Benefits Enrollment on the Deduction/Contribution Timing assigned to the employee's pay cycle. The new logic provides a more accurate estimated premium amount. This is the same logic used by the Update Employee Package Deductions application to generate the benefits premium deductions.

This affects the following tabs on the Life Events/New Hires screen and Benefits Enrollment screen:

- Medical Insurance
- Dental
- Vision
- Life Insurance
- AD&D
- Long-Term Disability
- Short-Term Disability
- Supplemental Life Insurance
- Supplemental AD&D
- Dependent Life Insurance
- Spouse Life Insurance
- Spouse AD&D
- Other Benefits tabs

Field Character Length Increased for Costpoint Leave Codes

Costpoint now allows you to enter and view up to 15 characters in **Leave Code** fields in order to have more descriptive codes that can be easily understood by users. The size of Leave Code fields increased from 6 to 15 in all affected tables. The display size in applications increased as well. This change applies to all fields that use leave code, which may have different field names (LV_CD, NEW_LV_CD, and/or PAYOUT_LV_CD).

This release updates the following applications to support the increased field length:

- Close Leave Year (LDPLYCLS)

- Compute Leave Accruals (LDPCLHF)
- Import Employee Leave Adjustments (LDPLEDIT)
- Import Employee Leave and Deductions (AOPUTLDL)
- Manage Employee Leave (LDMELV)
- Manage Leave Beginning Balances (LDMLBB)
- Manage Leave Codes (LDMLVTAB)
- Manage Leave Edit Table (LDMLEDIT)
- Post Leave Accruals (LDPLHF)
- Post Timesheets (LDPLDJ)
- Print Employee Leave Report (LDRELV)
- Print Employee Leave Statements (LDRLSTAT)
- Print Leave Edit Report (LDRLEDIT)
- Reconcile Leave Balances (LDPLVREC)
- Total Compensation (HTMTOTALCOMP)
- View Leave History (LDQLHF)

Send Project Work Force End Dates to Shop Floor Time

When you export employee work force records to the Shop Floor Time, the process now transfers the dates when the Shop Floor Time employees were removed from the project. This allows Shop Floor Time to accurately record the time charged for the project.

To support this functionality, Costpoint updates the following screens:

- Manage Employee Work Force (PJMWORK)
- Export Data to Deltek Time and Expense (LDPDTC)
- Export Project Manufacturing Data (LDPEXPM)

Build Part Description as the MO Build Description in Export Data to Deltek Time and Expense

If you are a Costpoint Cloud GovCon Moderate user, the application automatically sets the **MO Build Description** to use the Build Part Description and not the Build Part ID. As a result, when you export manufacturing orders to Deltek Time and Expense, the application always exports Build Part Description as the MO build description.

Export Data to Deltek Time and Expense (LDPDTC)

This release also applies the following changes to the Export Data to Deltek Time and Expense application:

- The **MO Build Description** options were moved from the Export Information tab to the Base/Link Tables tab.
- The **Employee Groups** group box on the Resource Information tab provides the following fields:

Field	Description
Supervisor Source	From the drop-down list, select the source of the supervisor groups. Supervisor groups can be based on one of the following: ▪ **Administrator Name from Employee Setup**: If you select this option, employees will be grouped based on the Administrator Name to which they are linked on the Manage Employee Information screen. ▪ **Supervisor from Salary Setup**: If you select this option, employees will be grouped based on the Supervisor to which they are linked on the Manage Employee Salary Information screen. The drop-down list will only be enabled if you select the **Supervisor Groups** check box.
Manager Source	From the drop-down list, select the source of the manager groups. Manager groups can be based on one of the following: ▪ **Manager from Salary Setup**: If you select this option, employees will be grouped based on the Manager to which they are linked on the Manage Employee Salary Information screen. ▪ **Supervisor from Salary Setup**: If you select this option, employees will be grouped based on the Supervisor to which they are linked on the Manage Employee Salary Information screen. The drop-down list will only be enabled if you select the **Manager Groups** check box. The **Manager Source** drop-down list replaces the **Export Salary Information Supervisor Data instead of Manager Data** check box.
Owner Source (For Home Org Groups)	From the drop-down list, select the source of the home organization group owners. Home organization group owners can be based on one of the following: ▪ **No Group Owner**: If you select this option, no owner will be assigned to the home organization group. ▪ **Home Org Manager**: If you select this option, the home organization group owner will be based on the Manager that's assigned to the home organization on the Manager/HR Reps by Organization screen. ▪ **Home Org Supervisor**: If you select this option, the home organization group owner will be based on the Supervisor that's assigned to the home organization on the Manager/HR Reps by Organization screen. The drop-down list will only be enabled if you select the **Home Org Groups** check box.
Owner Source (For HR Groups)	From the drop-down list, select the source of the home organization group owners. Home organization group owners can be based on one of the following:

Field	Description
	▪ **No Group Owner**: If you select this option, no owner will be assigned to the home organization group. ▪ **Home Org Manager**: If you select this option, the home organization group owner will be based on the Manager that's assigned to the home organization on the Manager/HR Reps by Organization screen. ▪ **Home Org Supervisor**: If you select this option, the home organization group owner will be based on the Supervisor that's assigned to the home organization on the Manager/HR Reps by Organization screen.

Manage Employee Information (LDMEINFO)

The existing **Supervisor Name** field was renamed to "Administrator Name." The purpose of this is to differentiate the existing field from the new **Supervisor** field on the Manage Employee Salary Information screen.

Note: This update also applies to the View Employee Information screen.

Support for Project Functional Roles in Export Data to Deltek Time and Expense

Costpoint provides you with the ability to assign multiple roles to a project and export the Project/Employee/Role combinations from Costpoint to Deltek Time & Expense. Prior to this enhancement, you can assign only one Project Manager to a project.

You also can continue exporting the Project with the Project Manager that is linked on the Manage Project User Flow screen if you do not set up the project on the new Manage Project Roles table. As part of this update, the label of the existing **Export Project Manager** check box will be changed to "Export Project Roles (UDT02_SPVSR)."

Support Project Long Name in Export Data to Deltek Time and Expense

In version 8.1, Costpoint adds a new field to the Details tab of the Manage Project User Flow screen. This new field allows you to use up to 120 characters to describe the project. The Export Data to Deltek Time and Expense screen was updated so that the **UDT02 Name** field and Charge Tree branch description can be populated with the Project Long Name in Deltek Time and Expense.

To support this new functionality, this release applies the following updates:

- A new **Project Long Name** option was added to the existing **Project Name** drop-down list on the Base/Link Tables tab. Use this option to populate the UDT02 description and CHARGE project-based CB record's Branch Description field with the project's long name. If you select the **Project Long Name** option, the following apply:
  - The **UDT02 Name** field is populated with the Project Long Name.
  - The **Branch Description** field in the project-based CB records in the CHARGE file is populated with the Project Long Name. You can see that value in Deltek Time and Expense

when you use the Lookup function to find a charge code for your timesheet or expense report.

- The **Expense Tables** group box was removed from the Base/Link Tables tab. The existing **Expense Payments** check box moves into the **Base Tables** group box.
- The label for the existing **Export Project Manager** check box on the Base/Link Tables tab changed to "Export Project Managers (UDT02_SPVSR)"
- The existing **Invoice Information** group box and the **Invoice Timesheet** check box were transferred from the Base/Link Tables tab to the Resource Information tab.
- The **Government ID Options** group box and its contents were removed from the Resource Information tab. These options only applied to Time and Expense Version 8.3, which is no longer supported.
- The source of UDT02 Name field in project-based UDT02 records were updated.
- The source of Branch Description in project-based CHARGE-CB records were updated.
- The cover page of the report displays the Project Long Name parameter. The report also moves the Invoice Information group box/Invoice Timesheet check box parameter under the Subcontractor parameters.

Auto-Generate Leave Without Pay

Costpoint now allows you to automatically generate a new negative leave without pay (LWOP) line when a positive LWOP timesheet line is added. You must link the negative LWOP pay type to the positive LWOP pay type on the Manage Pay Types screen where a new optional field has been added. When you enter an LWOP pay type on a timesheet line, if that pay type has a linked negative LWOP pay type, you will be given the option to create a negative LWOP timesheet line that will mirror the positive LWOP. This will occur when you move out of the timesheet line, upon save, or when you select **Negative LWOP**.

Previously, only positive LWOP were auto-adjusted and negative LWOP lines were not auto-adjusted by those applications because there was no way to determine to which positive LWOP line they should be linked. As a result of this enhancement, there will be a linkage between the positive and negative LWOP lines (TS_LN.NEG_LWOP_REF_KEY) when they are automatically created by the system. Now, when timesheets are auto-adjusted after a negative LWOP is created by the system, the system will auto adjust both the positive and negative LWOP lines.

Note: If you add a negative LWOP line, that link between the positive and negative will not be created and the negative LWOP line will not be auto adjusted.

The negative LWOP functionality cannot be used when the timesheet type is N- Reversing, Reversing, Salary Cap, or Leave Payout; or when the timesheet has been reversed or posted.

Manage Pay Types (LDMPAYTP)

You can now link a negative LWOP pay type to a positive LWOP pay type in order for the system to use that linkage to automatically create a negative timesheet line when a positive LWOP pay type is entered.

The screen provides the following new field:

Field	Description
Negative LWOP Pay Type	**Note:** This field is only visible and enabled when you select the **Leave Without Pay (LWOP)** check box. This is an optional field. Enter, or click to select, a negative LWOP pay type to link to a positive LWOP pay type. Costpoint will use this field to automatically create a negative LWOP line when this pay type is entered on a timesheet line. You may link the same negative LWOP Pay Type to more than one positive LWOP pay type. However, if you use Costpoint Payroll and consolidate the positive and negative LWOP pay types into one line in the paystub's Hourly Rate Detail section, you must create a negative LWOP pay type for each positive LWOP pay type.

Manage Timesheets (LDMTIME)

You can now enter an LWOP timesheet line and have the system automatically create a new corresponding negative TS line in order to streamline the data entry process.

The screen provides the following new functions/fields:

Field	Description
Negative LWOP	Click this button to create a negative LWOP line for the positive LWOP pay type. You may add only one negative LWOP timesheet line for each positive LWOP timesheet line.
Negative LWOP Reference Number	If the system creates a negative LWOP timesheet line, this hidden field stores the reference number for the positive LWOP timesheet line.

Manage Correcting Timesheets (LDMCTIME)

You can now enter an LWOP timesheet line and have the system automatically create a new corresponding negative timesheet line in order to streamline the data entry process.

The screen provides the following new functions/fields:

Field	Description
Negative LWOP	Click this button to create a negative LWOP line for the positive LWOP pay type. You may add only one negative LWOP timesheet line for each positive LWOP timesheet line.
Negative LWOP Reference Number	If the system creates a negative LWOP timesheet line, this hidden field stores the reference number for the positive LWOP timesheet line.

Create Retroactive Timesheet Adjustments (LDPRETRO)

When the auto-adjust functionality creates a new negative LWOP TS line, the application populates the NEG_LWOP_REF_KEY column on the TS_LN_HS_RETRO table with the TS_LN_KEY from the positive LWOP timesheet line.

Import Timesheets from Deltek Time and Expense (LDPUPET)

You can now import timesheets from Deltek Time and Expense and have the system automatically create a negative LWOP timesheet line for any positive LWOP timesheet lines. If you enable this functionality, you no longer need employees to enter any negative LWOP lines.

The screen provides the following new functions/fields:

Field	Description
Generate Negative LWOP TS Lines	Select this check box to create a negative LWOP timesheet line for any positive LWOP timesheet lines that do not already have one. The pay type for the positive LWOP timesheet line must have a linked negative LWOP pay type on the Manage Pay Types screen. When you select this check box, the following options display: ▪ Exclude timesheets with existing negative LWOP lines ▪ Delete and regenerate existing negative LWOP lines
Exclude timesheets with existing negative LWOP lines	Select this option to exclude timesheets with existing negative LWOP lines from the application processing. If a timesheet for an employee has any negative LWOP lines in the input file, the application will not delete the negative LWOP lines and will skip that timesheet when it generates negative LWOP TS lines.
Delete and regenerate existing negative LWOP lines	Select this option to delete all existing negative LWOP lines from the file regardless of whether or not they are linked to a positive LWOP line. The application will then generate new negative LWOP lines for any positive LWOP lines.

Import Timesheets (AOPUTLTS)

You can now import timesheets and have the system automatically create a negative LWOP timesheet line for any positive LWOP timesheet lines. If you enable this functionality, you no longer need employees to enter any negative LWOP lines.

The screen provides the following new functions/fields:

Field	Description
Generate Negative LWOP TS Lines	Select this check box to create a negative LWOP timesheet line for any positive LWOP timesheet lines that do not already have one. The pay type for the positive LWOP timesheet line must have a linked negative LWOP pay type on the Manage Pay Types screen. When you select this check box, the following options display: ▪ Exclude timesheets with existing negative LWOP lines

Field	Description
	▪ Delete and regenerate existing negative LWOP lines
Exclude timesheets with existing negative LWOP lines	Select this option to exclude timesheets with existing negative LWOP lines from the application processing. If a timesheet for an employee has any negative LWOP lines in the input file, the application will not delete the negative LWOP lines and will skip that timesheet when it generates negative LWOP TS lines.
Delete and regenerate existing negative LWOP lines	Select this option to delete all existing negative LWOP lines from the file regardless of whether they are linked to a positive LWOP line. The application will then generate new negative LWOP lines for any positive LWOP lines.

Configure Labor Settings (LDMLABOR)

Costpoint administrators can now allow the generation of negative LWOP TS lines and set up the handling of existing negative LWOP timesheet lines in order to control and standardize the negative LWOP functionality across different applications.

The screen provides the following new functions/fields:

Field	Description
Allow generation of negative LWOP TS lines	Selecting this check box to enable the automatic negative LWOP timesheet line generation functionality in the timesheet applications. When you select this check box, the screen enables the following options, which determine how existing negative LWOP timesheet lines are handled when a user selects to create negative LWOP timesheet lines for a timesheet: ▪ Exclude timesheets with existing negative LWOP lines ▪ Delete and regenerate existing negative LWOP lines
Exclude timesheets with existing negative LWOP lines	Select this option to exclude timesheets with existing negative LWOP lines from the application processing. If a timesheet for an employee has any negative LWOP lines in the input file, the application will not delete the negative LWOP lines and will skip that timesheet when it generates negative LWOP TS lines.
Delete and regenerate existing negative LWOP lines	Select this option to delete all existing negative LWOP lines from the file regardless of whether they are linked to a positive LWOP line. The application will then generate new negative LWOP lines for any positive LWOP lines.

Set Up Company (SYPCOMP)

Costpoint administrators can now specify the default values of the negative LWOP options on the Configure Labor Settings screen during the setup of a new company.

Post Labor (LDPLDJ)

When you run the Post Labor process, the application now inserts the new reference key into the TS_LN_HS table.

Apply Timesheet Adjustments in Batch Mode (LDPAUTO)

Costpoint administrators now have the ability to have the system automatically create a new negative timesheet line in order to streamline the data entry process.

The screen provides the following new option in the **Process Type** group box:

Field	Description
Generate Negative LWOP	Select this option to create a negative LWOP line when the system encounters a timesheet that has a line with a positive LWOP. The negative LWOP functionality for existing negative LWOP lines will be determined by the setup on the Configure Labor Settings screen.

Removal of Resource Planning Integration

In 2019, Costpoint ended the support for the data integration to Resource Planning. Costpoint 8.1 now completely removes the application and functionality related to this integration. The following are changes in this release:

- The Transfer Deltek Resource Planning Data (AOPRPDAT) screen is no longer available from the Costpoint menu and application search.
- You can no longer select **Deltek Resource Planning** from the **Integration Type** drop-down lists on the following screens:
  - Configure Employee Options (AOMVSEM)
  - Configure Organization Options (AOMVSOR)
  - Configure Project Options (AOMVSPJ)

Payroll Toolkits Separated into Two Different Screens

The existing functionality on the Payroll Toolkits screen is now available as two different applications in Costpoint 8.1. This update prevents issues that occurred on the previous Payroll Toolkit screen.

Create Payroll Records to Repay Social Security (PRPTOOLKIT)

The Create Payroll Records to Repay Social Security screen provides the same functionality as the **Create payroll records to repay deferred Social Security** option on the previous Payroll Toolkit screen. Use it to generate an X-type payroll record that will be used to repay an employee's deferred Social Security withholding tax.

Click **Costpoint People » Payroll » Payroll Utilities** to access this screen.

Create Deferred Tax Payment Records (EMPDFRDTAXPAY)

The new Create Deferred Tax Payment Records screen provides the same functionality as the **Create Deferred Tax Payment Records** option on the previous Payroll Toolkits screen. Use it to generate

Manage Deferred Tax Payments records for tracking deferred Social Security amounts that are already repaid and the future repayment amount.

Click **Costpoint People » Employee » Employee Utilities** to access this screen.

Deltek Talent Management Integration Console

A new application, Talent Management Integration Console (EMQTMINT), provides information on the data transfer between Costpoint and Deltek Talent Management. It also displays specific details on employee data imports from Talent Management.

The new screen features the following:

- **Integration Info**: This tab lists the date and time of the latest run for the import and export of data. The information on this tab is not real-time. You need to click **Refresh** every time you run a new transfer on the Transfer Talent Management Data screen.
- **View TM Employee Import History**: This tab contains all the employees successfully imported into Costpoint from Deltek Talent Management. You can click the Employee ID to display the employee record from the Manage Employee Information screen.
- **View TM Pending Employees for Import**: This tab lists all employee records that are waiting to be imported from Talent Management. You must click the **Refresh** button to load the Talent Management employee records into the table. This tab provides the following subtasks:
  - **TM Employee Details**: This subtask contains the field and corresponding value from the employee record of the new hire from Talent Management. You can use this screen to verify values before importing into Costpoint.
  - **Failed TM Employee Import History**: This subtask lists the instances when the employee record failed to import into Costpoint. It also displays the corresponding details of the failure.

Optional Entry of HSA Direct Deposit Information on Life Events and Benefits Enrollment

Costpoint now allows you to set the entry of direct deposit information as optional when employees enroll in a Health Savings Account (HSA) on the Life Events/New Hires screen and Benefits Enrollment screen. Prior to this enhancement, you can only require or not allow direct deposit information for HSAs.

Manage Taxable Entity Settings (AOMESSCS)

The previous **Allow HSA Account Selection** check box was removed and replaced with the following options:

Field	Description
HSA Account Setup	Use these options to require, not require (make optional), or not allow employees to enter HSA direct deposit information when they enroll in an HSA during life events or benefits enrollment. The options are: ▪ **Required**: Select this option to require employees to enter direct deposit information for HSA enrollment during life events or benefits enrollment. The employee must have a direct deposit account with a **Usage** value of **HSA** on the Direct Deposit tab/screen. The account must be active and the method must be set to **Percent**. If the employee does not provide direct deposit information for the

Field	Description
	HSA enrollment, Costpoint will display an error message upon confirmation. ▪ **Optional**: Select this option to allow an employee to confirm the HSA enrollment during life events or benefits enrollment even without direct deposit information. The employee can enter the HSA direct deposit information at a later time when the bank information is available. If the employee does not provide direct deposit information for the HSA enrollment, Costpoint will display a warning message upon confirmation. ▪ **Do not allow**: Select this option to not allow the setup of direct deposit information for HSAs. Costpoint will not display an error or warning message upon confirmation of HSA enrollment in life events or benefits enrollment.

Life Events/New Hires (ESMLIFEEVENT)

The application was updated to support the new logic for the **HSA Account Setup** options on the Manage Taxable Entity Settings screen. Based on the **HSA Account Setup** option, the screen will perform the corresponding actions:

- **Required**: When the employee enrolls in an HSA, the screen requires direct deposit account with a **Usage** value of **HSA**; otherwise, the following message displays upon confirmation of the life event: “A direct deposit account with a Usage type of ‘HSA’ must be entered when an HSA is elected and deposited through direct deposit. The account must be active and the method must be ‘Percent’.”
- **Optional**: If the employee does not have a direct deposit account setup with a **Usage** value of **HSA**, the following displays upon confirmation of the life event: “A direct deposit account may be needed for Health Savings Account deposits.”
- **Do Not Allow**: The screen will not display an error or warning message and the **Usage** field on the Direct Deposit tab will not be available.

Direct Deposit (ESMDIRDEP)

When you select **Do Not Allow** as the **HSA Account Setup** option on the Manage Taxable Entity Settings screen, the **Usage** field will not be available.

Blank Stock Advices and Checks Will No Longer Print a Combined Line on the Paystub

If you print **Blank Stock** type paycheck or payment advice types on the Print Paychecks screen and Print Payment Advices screen, the applications will no longer print a combined line when the number of earnings, deduction, and/or hourly rate detail rows exceed the available space on the paystub. In this scenario, the applications will provide an option to continue the printing of paystub information on multiple pieces of blank stock form.

The paystub now also provides a new field that displays Rate Type/Pay Frequency/Pay Period Salary Amount.

Materials

This section describes Costpoint 8.1 enhancements for the Materials domain.

Supplier Portal—RFQ Functionality

This feature allows you to submit Requests for Quotes (RFQ) to vendors via the Supplier Portal and the supplier will then be able to review the RFQ and respond with a quote while keeping all communication and RFQ/Quote actions visible. The Buyer and Supplier dashboards will also have visibility into RFQs awaiting response to allow proactive follow-up.

Manage Request for Quotes by Vendor (PPMRFQV)

When a Request for Quote (RFQ) is created, an email is sent to the supplier/vendor. If the buyer updates an RFQ, an email notification is sent to the supplier indicating the change. An Action History entry is created for each action taken.

The following are the changes to this screen:

- **Email Address**: This new email field has been added under Vendor Contact to enable you to store and send a notification when creating an RFQ to the vendor when requesting for quotes.
- **Supplier Portal Email Notification**: Select this check box to send email alerts to the supplier whenever there are portal information action changes.

  This check box initially defaults from the **Supplier Portal Email Notification** check box associated with the RFQ line buyer. If the PO setting allows edits to this check box, you can change the loaded value in this application; otherwise, it will be disabled.

  > **Note:** If not you are not licensed for Supplier Portal, this check box is set to cleared and disabled.

- **Released to Supplier**: Select this check box to release the RFQ line and all associated line quantity breakpoints and/or delivery schedule lines to the supplier on the specified release date. This check box also affects the sending of emails to suppliers. On new RFQ records, releasing to the supplier is allowed if the line status is set to Open and an email is sent. The same applies to an existing RFQ without a quote and previously released to the supplier, if the status changes from Open to Void, Pending, or Closed, an email is sent. The opposite is true for existing RFQs with a quote.
- **Released Date**: This date defaults to the current date but is editable when the RFQ along with RFQ lines/line quantity breakpoints/delivery schedule lines) is released to the vendor. This is a required field if the **Released to Supplier** is selected.
- **Action History**: This new subtask contains specific fields in the RFQ that were updated by the buyer. It also contains history details of communication with the supplier.
- **Action Information**: This new tab has **Action** and **Notes** fields, and you can release individual lines to the supplier using the Released to Supplier action. This tab is hidden if you are not licensed for the Supplier Portal.

These changes also apply to the Manage Request for Quotes by Item (PPMRFQI) screen.

Apply PO Info on Purchase Requisitions by Line (PPMRQLN)

The following are the changes to this screen:

- When you create a request for quote (RFQ) on these screens, an email is sent to the vendor requesting the quote for the line. You can also communicate with the supplier via the RFQs and vendor quotes if these are created via the Supplier Portal.
- For a previously saved RFQ and/or RFQ line with a status as Closed or Void and used in a new row, the RFQ header status is disabled. If you need to edit the RFQ header status, you can do so by using the Manage Request for Quotes by Vendor.
- **Email Address**: This new email field has been added under Vendor Contact to enable you to store and send a notification when creating an RFQ to the vendor when requesting for quotes.
- **Supplier Portal Email Notification**: Select this check box to send email alerts to the supplier whenever there are portal information action changes.

  This check box initially defaults from the Supplier Portal Email Notification check box associated with the RFQ line buyer. If the PO setting allows edits to this check box, you can change the loaded value in this application; otherwise, it will be disabled.

  Note: If you are not licensed for Supplier Portal, this check box is set to cleared and disabled.

- **Released to Supplier**: This read-only check box displays the value from the RFQ header and is selected if the RFQ header has been released to the supplier.
- **Released Date**: This read-only date indicates when the RFQ along with RFQ lines/line quantity breakpoints/delivery schedule lines) was released to the vendor.
- **Action History**: This new subtask contains specific fields in the RFQ that were updated by the buyer. It also contains history details of communication with the supplier.
- **Action Information**: This new tab has **Action** and **Notes** fields, and you can release individual lines to the supplier using the Released to Supplier action. This tab is hidden if you are not licensed for the Supplier Portal.

These changes also apply to the Apply PO Info on Purchase Requisitions (PPMNTRQ2) screen.

Manage Quotes (SPMQTV)

A new application (**Materials » Supplier Portal » Dashboards/Actions » Manage Quotes**) has been added to display a simple version of the Manage Vendor Quotes by Vendor screen. The Supplier can view the request for quotes and create their quote data in this new screen. Once the quotes are submitted/released to the buyer by the vendor, the quotes created via the Supplier Portal can now be seen and reviewed by the buyers on the Manage Vendor Quotes by Vendor/Manage Vendor Quotes by Item screens. Both buyer and supplier will be able to communicate about an RFQ/quote via the **Notes** that triggers an email notification to both parties.

Manage Vendor Quotes by Vendor (PPMQTV)

This application now allows buyers to communicate to the vendor via the Manage Quotes screen. Quotes created from the Supplier Portal will be available only on the Manage Vendor Quotes by Vendor/Manage Vendor Quotes by Item screens once the quote line has been set to Released to Buyer from the Supplier Portal's Manage Quotes screen. New/copy/delete functions are not allowed (with validation message) on this screen for quotes created by the supplier.

The following are the changes to this screen:

- **Submitted by Supplier**: Use this check box to indicate that the quote is created in Supplier Portal and the buyer cannot edit the details of the quote.
- **Action Information**: This new tab has **Action** and **Notes** fields. This tab is hidden if you are not licensed for the Supplier Portal.
- **Action History**: This new subtask contains specific fields in the quote that were updated by the supplier. It also contains history details of communication with the supplier.

These changes also apply to the Manage Vendor Quotes by Item (PPMQTI) screen.

Supplier Portal Dashboard (SPDSP)

A new dashpart, Pending Supplier Action (by Request for Quotes), displays all request for quotes (RFQ) that have at least one (1) RFQ line with pending supplier action. Click the hyperlink to open the RFQ on the Manage Quotes screen.

Buyer Dashboard (PODBUYER)

A new dashpart, Open Request for Quotes, displays all request for quotes with Open status. Click the hyperlink to open the RFQ on the Manage Request for Quotes by Vendor screen.

Supplier Portal—Manage Supplier Actions—Multi-Select Print PO Range

Manage Supplier Actions (SPMSPACT)

This feature allows you to select multiple records to print on the Manage Supplier Actions screen. If multiple purchase order (PO) lines or delivery lines are selected from different POs, you can print the report once for each unique PO. This is similar to printing a range of POs on the Print Purchase Orders screen.

Supplier Portal—Emails Should Contain the Logged-in User's Company

This feature allows you to see the company name/vendor name in the subject of Supplier Portal email notifications to indicate which company sent the email.

Manage Purchase Orders (POMMAIN)

The email template has been changed to allow inclusion of the logged-in user’s company name in the header section.

This change also applies to the following screens:

- Manage Buyer Actions (POMBACT)
- Expedite Purchase Orders (POMEXPD)
- Create Blanket Purchase Order Releases (POMRELS)
- Manage Subcontractor Invoices (SMMMINVC)
- Approve Supplier Invoices (SMMAINVC)

Manage Supplier Actions (SPMSPACT)

The email template has been changed to allow inclusion of the logged-in user's vendor name in the header section to make it easier for the buyer/payer to know which supplier sent the email.

This change also applies to the Manage Invoices (SPMINVC) screen.

Manage Shipping Information (SPMSHIP)

The email template has been changed to allow inclusion of the logged-in user's vendor name in the header section to make it easier for the Costpoint recipient to know which supplier sent the email.

Supplier Portal—Manage Vendors Flag Supplier Portal Use

This feature adds the **Supplier Portal Enabled** check box to the Manage Vendors screen to indicate whether that vendor is setup for the Supplier Portal. This feature also applies the following functionality changes:

- Alter dashboard filters on Supplier Portal-only charts/lists to show only data for vendors using the Supplier Portal
- Alter email notification default if the vendor is using the Supplier Portal
- Hide Actions and do not update history for POs where the vendor is not using the Supplier Portal
- Turn off Implement Actions changes for POs where the vendor is not using the Supplier Portal

Manage Vendors (APMVEND)

To set up vendors for Supplier Portal, the **Supplier Portal Enabled** check box has been added to the Manage Vendors screen. When you access the Supplier Portal, the dashboard displays information of vendors that have their **Supplier Portal Enabled** check box selected.

If you select the **Supplier Portal Enabled** check box, you can also select the **Enable Digital Signature** check box to allow that vendor to use a digital signature to approve invoices associated to them.

For existing vendors, if their **Enable Digital Signature** check box is cleared prior to this enhancement, the **Supplier Portal Enabled** check box also defaults to cleared. Otherwise, if their **Enable Digital Signature** checkbox is selected prior to this enhancement, the **Supplier Portal Enabled** check box is automatically selected.

To disable a vendor from accessing Supplier Portal, you must clear the **Enable Digital Signature** check box first, if it is selected, before clearing the **Supplier Portal Enabled** check box.

Import Vendors (AOPUTLVU)

The **Enable Supplier Portal** column has been added to the vendor input file. When importing vendors, enter **Y** in the **Enable Supplier Portal** column to enable Suppler Portal access for that vendor, otherwise, enter **N**.

Imported vendor records that have their **Enable Supplier Portal** column set to **Y** will automatically have the **Enable Supplier Portal** check box when you access the record on the Manage Vendors screen.

Manage Subcontractor Invoices (SMMMINVC)

The logic of this application has been modified to update the Invoice Approval History subtask and send email notifications only if the **Supplier Portal Enabled** check box in Manage Vendors is selected for the supplier.

Approve Subcontractor Invoices (SMMAINVC)

The availability of the **Supplier Approval** group box now also depends on the **Supplier Portal Enabled** check box in Manage Vendors:

- If you are licensed for Supplier Portal and the **Supplier Portal Enabled** check box is selected for the supplier, the **Supplier Approval** group box is disabled.
- If you are not licensed for Supplier Portal or the **Supplier Portal Enabled** check box is not selected for the supplier, the group box is enabled and you can approve the subcontractor invoice on this screen.

For internal approval, this application updates the Invoice Approval History subtask only if the **Supplier Portal Enabled** check box is selected for the supplier.

Manage Purchase Orders (POMMAIN)

The following are the functionality changes on this screen:

- The **Implement Action Changes** button, top action menu list, and the right-click action menu option are hidden if you are not licensed for Supplier Portal or if the new **Supplier Portal Enabled** check box (Manage Vendors) is not selected.
- The logic of this application has been modified so that the **Released to Vendor** check box does not affect the line action information.
- If you are not licensed for Supplier Portal or if the new **Supplier Portal Enabled** check box (Manage Vendors) is not selected, the **Supplier Portal Email Notification** check box and the Action Information tab/Action Information fields (PO Line) are hidden on the screen.

Create Blanket Purchase Order Releases (POMRELS)

If you are not licensed for Supplier Portal or if the new **Supplier Portal Enabled** check box (Manage Vendors) is not selected, the Action Information tab/Action Information fields (PO Line/Delivery Schedule subtask) are hidden on the screen. Previously entered action history while the PO vendor **Supplier Portal Enabled** check box is selected will remain.

Expedite Purchase Orders (POMEXPD)

If you are not licensed for Supplier Portal or if the new **Supplier Portal Enabled** check box (Manage Vendors) is not selected, the **Supplier Portal Email Notification** check box and the Action Information tab/Action Information fields (PO Line) are hidden on the screen. Previously entered action history while the PO vendor **Supplier Portal Enabled** check box is selected will remain.

Buyer Dashboard (PODBUYER)

For POs with the **Supplier Portal Enabled** check box (Manage Vendors screen) not selected for the PO vendor, the POs will not be displayed in the following dashparts:

- Pending Buyer Action (by Purchase Order)
- Pending Buyer Action (across Purchase Order)
- Pending Release to Supplier (by Purchase Order)
- Upcoming Deliveries

The following dashparts that do not rely on Supplier Portal action; display POs that meet the screen selection criteria regardless of the status of the **Supplier Portal Enabled** check box on the Manage Vendors screen:

- Past Due Deliveries
- Open Purchase Orders
- Target Place Dates

The bars under Pending Buyer Action (across Purchase Order) have been renamed to the following:

- Change Accepted (previously Change Request Accepted)
- Change Rejected (Previously Change Request Rejected)
- Cancel Rejected (previously Cancel Request Rejected)
- Cancel Accepted (previously Cancel Request Accepted)

Note: The Manage Buyer Actions screen loads all purchase orders based on the dashparts. However, Supplier Portal related actions (Last Action, New Action, and other related fields) is disabled or you will encounter an error validation for POs with PO vendor where **Supplier Portal Enabled** check box on the Manage Vendors screen is not selected.

Manage Buyer Actions (POMBACT)

If you are licensed for Supplier Portal but the new **Supplier Portal Enabled** check box (Manage Vendors) is not selected, the Last Action- and New Action-related information are disabled. The Action History information will still be available and will display information that was entered while the PO vendor **Supplier Portal Enabled** check box was selected.

Import Purchase Orders (AOPUTLPO)

The logic of this application has been modified to default the PO header **Supplier Portal Email Notification** check box to not selected if the PO vendor **Supplier Portal Enabled** check box is not selected.

Load Supplier Portal Last Action (POPLDACT)

The application now excludes purchase orders from the update process if the new **Supplier Portal Enabled** check box on the Manage Vendors screen is not selected. If you selected only one PO, the application displays an error message.

Create Purchase Orders (PPPGPO)

If you are not licensed for Supplier Portal or if the new **Supplier Portal Enabled** check box on the Manage Vendors screen is not selected, the **Supplier Portal Email Notification** check box on the PO header is disabled.

Supplier Portal Dashboard (SPDSP)

The dashboard will only load purchase orders for PO vendor with the new **Supplier Portal Enabled** check box selected on the Manage Vendors screen.

Note: If this new check box is changed from selected to cleared, with existing portal activities, you will not be able to view those POs. The orders will continue to be processed, but all further communications will be handled outside of Supplier Portal.

Manage Supplier Actions (SPMSPACT)

When you do a query of purchase orders, the application will only display POs with **Supplier Portal Enabled** check box selected for the vendor on the Manage Vendors screen.

> **Note:** If this new check box is changed from selected to cleared, with existing portal activities, you will not be able to view those POs. The orders will continue to be processed, but all further communications will be handled outside of Supplier Portal.

Manage Shipping Information (SPMSHIP)

You can only view and enter shipping information for PO with a vendor ID that matches the vendor ID on the company that the you are logged into, and if the **Supplier Portal Enabled** check box on the Manage Vendors screen is selected. The Query and Lookup (PO/Rlse fields) functions will only display PO and shipping information with PO vendor where the **Supplier Portal Enabled** check box is selected on the Manage Vendors screen.

Manage Invoices (SPMINVC)

You can only view and enter invoices for PO with a vendor ID that matches the vendor ID on the company that the you are logged into, and if the **Supplier Portal Enabled** check box on the Manage Vendors screen is selected. The Query and Lookup (PO/Rlse fields) functions will only display PO and load invoices for POs with PO vendors where the **Supplier Portal Enabled** check box is selected on the Manage Vendors screen.

Supplier Portal—Buyer and Supplier Dashboard Updates

This feature adds the **Pending Supplier Action (across Purchase Orders)** to the Buyer Dashboard to provide more visibility into purchase orders (POs) that have not received a supplier response. Also, both dashboards now have lists displaying RFQs that are pending action as well as DPAS Rated indicators on POs. Additional filter functionality allows the Buyer Dashboard to be filtered by multiple buyers as well as vendor and vendor contact, and the Supplier Portal Dashboard can now be filtered to see POs for a specific vendor contact.

Manage Buyer Groups (POMBYGRP)

A new application (**Materials » Purchasing » Purchasing Codes » Manage Buyer Groups**) has been added to enable you to create groups of buyers. You can use buyer groups to filter Buyer Dashboard information, assign buyers to a particular group using the Link Buyers subtask, and assign a buyer to one or more groups using the Link Buyer Groups subtask on the Manage Buyers screen. A buyer group is company-specific, and once saved, the Buyer Group ID cannot be changed, but the description can be edited. When you delete a Buyer Group row, Costpoint displays a warning and automatically removes all linked buyers in the Buyer Group.

Manage Buyers (POMBUY)

A new subtask, Link Buyer Groups, has been added to the screen to link the buyer to one or more buyer groups. When you delete a buyer, the link to the buyer groups will be removed.

Buyer Dashboard (PODBUYER)

The Global Settings now allows you to filter data that displays on the dashboard based on:

- One buyer, or buyers within a range of buyer groups
- One vendor or a range of vendors
- A vendor's email address (when a buyer wants to see the purchase orders related to a specific contact person within the same vendor.)

In addition, a new dashpart, **Pending Supplier Action (across Purchase Orders)**, has been added to display data on PO lines that are pending response from the supplier.

Supplier Portal Dashboard (SPDSP)

A Global Settings (Vendor Contact Email) have been added to the screen to allow you to filter dashboard data based on a vendor's contact email as saved on the PO header. You can use this to see POs for a specific contact person within the same vendor.

Supplier Portal—Manage Supplier Actions—Include Ship To Address

This feature allows the Supplier Portal user to see the Ship To address for each purchase order (PO) line in Manage Supplier Actions. This lets the supplier know where the order line should be shipped without having to print or preview the PO.

Manage Supplier Actions (SPMSPACT)

On the Line Details subtask, the Ship ID reference has been removed, and the **Ship ID Desc** field and full address have been added. This new field corresponds to the Ship ID on the PO line.

Link and Consolidate Requisitions on RFQs and Quotes

This feature enables you to combine and consolidate multiple requisitions into one request for quote (RFQ) and then utilize and see this same consolidation by autoloading the RFQ onto the Quote. The feature also includes the addition of RFQ and Quote subtasks in Manage Purchase Requisitions for visibility into linked RFQs and Quotes for those Part/Revisions.

Manage Purchase Requisitions (PPMNTRQ1)

There are two new subtasks—Quotes at the header level and RFQs at the line level. These read-only subtasks display quote and RFQ records linked to the requisition/requisition line regardless of status (RFQ-Pending, Open, Closed/Quote–Open, and Closed). RFQ and Quote IDs will be displayed as hyperlinks on the Combined Req Line Details subtask.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

The following are the changes to this screen:

- Main screen: The Ref Quotes subtask has been renamed to Quotes.
- RFQ subtask
  - The **Add RFQ** field on the RFQs subtask has been renamed to **Include in RFQ**.
  - You can now link an existing RFQ/RFQ line to the Requisition line and/or create a new RFQ and/or RFQ Line.
  - The **Combined Req Lines Exist** check box has been added to indicate if the selected/entered RFQ/RFQ line is linked to consolidated requisition lines. This check box is

disabled and cleared when trying to link an RFQ/RFQ line to the requisition line you are working on. You cannot consolidate multiple requisition lines into a single RFQ on this screen.

  - On a new line, when you select/enter an RFQ ID/RFQ line that is existing in the system (not yet linked to any other requisition/requisition line), and you enter all required fields, the **Include in RFQ** check box remains cleared. Upon save, the system automatically populates the **Requisition** and **Requisition Line** fields with the Req ID and Req Line No you are working on and updates the existing RFQ record in the RFQ header, RFQ line, and the new table RFQ line requisition.
  - The **Include in RFQ** check box is cleared and disabled if the loaded RFQ/RFQ line is already linked to a requisition/requisition line, regardless of whether or not it matches the current main screen requisition/requisition line. If you need to link the currently linked RFQ/RFQ line to the current requisition/requisition line, add a new line and enter the RFQ ID/RFQ line that is not yet linked to an existing requisition/requisition line. If you enter an RFQ line number, Costpoint validates it to prevent a duplicate RFQ/RFQ line combination. If you do not enter an RFQ line number, the system auto assigns a line number for the RFQ ID based on the highest line number +1.
  - If you enter an RFQ line number, the system validates it to prevent a duplicate RFQ/RFQ line combination (existing logic). If you do not enter an RFQ line number, the system auto assigns a line number for the RFQ ID based on the highest line number +1.
  - For RFQ lookup, Costpoint loads and displays only Open/Pending RFQs.
  - For existing saved requisitions, the RFQs subtask loads and displays only Open/Pending/Closed RFQs that are linked to the item in the requisition line. If the RFQ/RFQ line is already linked to consolidated requisition lines, then the Combined Req Line Details subtask displays records of those requisition/requisition lines, and the **Combined Req Lines Exist** check box is selected and disabled.
- Quotes subtask
  - Costpoint now validates if the Quote ID being linked to the requisition is already existing and linked to other requisitions, and the **Combine with Other Requisitions** check box in the requisition header is selected.
- Assign PO/Assign PO-Combine subtasks
  - For the awarded quote, an error validation has been added to check if the awarded quote and vendor combination you entered exists. The selected/entered awarded quote also loads the vendor ID associated to it, if there's only one awarded quote/vendor ID combination; otherwise, you can select the correct vendor associated to it.
  - A validation has been added for the **Combine with Other Requisitions** check box when the Assign PO Option selected is Manual or Assign Now, and a purchase order ID is already existing and linked to other requisitions.

These changes also apply to the Apply PO Info to Purchase Requisitions by Line (PPMRQLN) screen.

Manage Request for Quotes by Vendor (PPMRFQV)

The following are the changes to this screen:

- You can now link and consolidate multiple requisitions into one RFQ or multiple requisition lines into an RFQ line via the new subtasks Combine Requisitions and Combined Req Line Details.
- New read-only check boxes, **Combined Reqs Exist** and **Combined Req Lines Exist**, have been added to the screen. These check boxes are selected if there is more than one record on the

Requisition Details and/or Req Line Details subtask, which indicates that there are multiple requisition and/or requisition lines that were consolidated under an RFQ/RFQ line.

- When you click the **Autoload** button, Costpoint loads all selected records and combine all part/revision based on the information from the Combine Requisitions subtask or the requisition ID from the header section.

> **Note:** Costpoint combines requisitions/requisition lines with an **Approved** status or have the same attributes, and the requisition's buyer should be the same with the selected buyer for the RFQ. Requisition/requisition lines with delivery schedules will not be combined.

- On the Combine Requisitions subtask, for a new RFQ record, you must click the **Autoload** button to load all approved requisitions/requisition lines where the requisition line buyer is the same as the RFQ header buyer. To automatically load/add other requisition records from other requisition to the RFQ line Child Table Window (CTW), use the **Autoload** button to load approved requisitions that are not yet linked to the RFQ, and select **Include in RFQ** for the record. If you must remove previously linked requisition/requisition lines, use the **Delete** button to delete the record or clear the **Include in RFQ** and/or the **Consolidate by Part/Rev** check boxes.
- You can use the **Check All Include in RFQ** and **Check All Consolidated by Part/Rev** buttons to select the **Include in RFQ** and **Consolidate by Part/Rev** check boxes for all records. The **Synch from RFQ Lines** button updates the Combine Requisitions subtask with the changes made manually from the RFQ line CTW. You must select this button whenever you manually add RFQ lines to make the Combine Requisitions subtask and the RFQ lines CTW match.
- The lookup for requisitions/requisition lines displays only approved requisitions and requisition lines for the item/revision or miscellaneous type combination wherein the requisition line buyer is the same as the RFQ header buyer.

Manage Request for Quotes by Item (PPMRFQI)

A new subtask, Combined Req Line Details, has been added to the screen to display requisition/requisition lines that have been consolidated into a single RFQ line from the Manage Request for Quotes by Vendor screen. Consolidation of multiple requisition lines into a single RFQ line can only be done on the Manage Request for Quotes by Vendor screen.

Manage Vendor Quotes by Vendor (PPMQTV)

You can now view the requisitions associated with the selected RFQ to be linked to the quote on this screen. New subtasks, Combined Requisitions and Combined Req Line Details, have been added to the screen to display all requisitions/requisition lines linked to the selected RFQ ID. When you click the **Autoload** button, the quote lines are loaded based on your selected RFQ ID.

If you do not enter an RFQ ID, you won't be able to link a quote to a requisition. If you enter an RFQ ID on the header section that is linked to one or more requisitions and you saved the record, the record in the RQ_LN_QUOTES table is also updated, and quotes from this screen will automatically reflect on the following screens: Manage Purchase Requisitions, Apply PO Info to Purchase Requisitions, and Apply PO Info to Purchase Requisitions by Line.

The **Combined Req Line Exist** check box has been added to the screen to indicate that the RFQ line has consolidated requisition lines and that there is more than one record on the new Combined Req Line Details subtask. On the Combined Req Line Details subtask, records only display when you enter an RFQ ID at the header section. If you manually enter a quote line, you cannot enter any information on this subtask.

Manage Vendor Quotes by Item (PPMQTI)

You can now view the requisitions associated with the selected RFQ to be linked to the quote on this screen. The **Combined Req Line Exist** check box has been added to the screen to indicate that the RFQ line has consolidated requisition lines and that there is more than one record on the new Combined Req Line Details subtask. On the Combined Req Line Details subtask, records only display when you enter an RFQ ID at the header section. If you manually enter a quote line, you cannot enter any information on this subtask.

View Vendor Quotes (PPQVQT)

All requisition lines linked to the RFQ used as a reference for the quote now displays on the new Combined Req Line Details subtask. Records display on the new subtask when you use an RFQ ID at the header section. If you manually enter a quote line, you cannot enter any information on this subtask.

View Purchase Requisition Status (PPQRQSTS)

The RFQ subtask will display RFQ records linked to the requisition/requisition line regardless of status (RFQ-Pending, Open, or Closed). RFQ IDs will be displayed as hyperlinks. The **Combined Req Lines Exist** check box has been added to indicate that the RFQ line has consolidated requisition lines. The Combined Req Line Details subtask has also been added to display all the requisition lines linked to the RFQ line.

On the Quotes subtask, a **Combined Req Lines Exist** check box has been added to indicate that the RFQ line linked to the quote line has consolidated requisition lines. The Combined Req Line Details subtask has also been added to display all the requisition lines linked to the RFQ line.

View Item Purchasing Information (PPQITEM)

Two new read-only subtasks, Quotes and RFQs, have been added to the screen to display all Open or Closed quotes and all Pending, Open, and Closed RFQs associated to the selected/entered Item/Revision/Misc Type from the main CTW.

Create Purchase Orders (PPPGPO)

The application logic has been corrected to address the process issue of creating purchase orders for requisitions one at a time, and where the requisitions have different **Combine with Other Requisitions** check box values but were assigned the same PO ID. In addition, an error message in the report has been added to inform the user that a PO is not created for the requisition that has the **Combine with Other Requisitions** check box set to cleared.

Implement Delivery Schedules on RFQs and Quotes

This feature allows you to include delivery schedules on requests for quotes (RFQs) and quotes so that the vendor has visibility to delivery schedules when creating the quote.

Manage Request for Quotes by Vendor (PPMRFQV)

The following are the changes to this screen:

- A Delivery Schedule subtask has been added on the main screen. This new subtask contains information about the delivery schedule for the request for quote (RFQ). The default values for this subtask comes from the requisition line(s) you selected, but you can edit the values or add a new delivery schedule if needed. On this subtask is another subtask, Delivery Schedule Details, which displays the details from where the schedule originated.

- Delivery Schedule subtasks have been added on the Combine Requisitions and Combined Req Line Details subtasks. These new subtasks contain read-only information about the delivery schedule for the requisition line.
- On the Combine Requisitions subtask, if you select the **Include in RFQ** and **Consolidate by Part/Rev** check boxes, and the requisition/requisition line(s) have associated delivery schedule(s), the system loads the delivery schedule info on the RFQ line Delivery Schedule subtask.
- A new field, **Delivery Schedule Exists**, has been added to indicate whether or not a line has a delivery schedule.
- Costpoint now also combines and groups requisition lines and delivery schedules by date. If a consolidated requisition line without a delivery schedule is combined with a requisition line with a delivery schedule, a delivery schedule row is created for the requisition line without a delivery schedule.

Manage Request for Quotes by Item (PPMRFQI)

The following are the changes to this screen:

- A Delivery Schedule subtask has been added on the main screen. This new subtask contains information about the delivery schedule for the request for quote (RFQ). The default values for this subtask comes from the requisition line(s) you selected, but you can edit the values or add a new delivery schedule if needed. On this subtask is another subtask, Delivery Schedule Details, which displays the details from where the schedule originated.
- A Delivery Schedule subtask has been added on the Combined Req Line Details subtask. This new subtask contains read-only information about the delivery schedule for the requisition line.
- A new field, **Delivery Schedule Exists**, has been added to indicate whether or not a line has a delivery schedule.

Manage Vendor Quotes by Vendor (PPMQTV)

The following are the changes to this screen:

- A Delivery Schedule subtask has been added on the main screen. This new subtask displays the following information:
  - For a manually loaded quote line, no default value is displayed, but the subtask remains editable.
  - For a quote line loaded from the RFQ line, default values are loaded but remain editable.

  On this subtask is another subtask, Delivery Schedule Details, which displays the details from where the schedule originated.
- Delivery Schedule subtasks have been added on the Combine Requisitions and Combined Req Line Details subtasks. These new subtasks contain read-only information about the delivery schedule for the requisition line.
- A new field, **Delivery Schedule Exists**, has been added to indicate whether or not a line has a delivery schedule.

Manage Vendor Quotes by Item (PPMQTI)

The following are the changes to this screen:

- A Delivery Schedule subtask has been added on the main screen. This new subtask contains information about the delivery schedule for the request for quote (RFQ). The default values for

this subtask comes from the RFQ line(s) you selected, but you can edit the values if needed. On this subtask is another subtask, Delivery Schedule Details, which displays the details from where the schedule originated.

- A Delivery Schedule subtask has been added on the Combined Req Line Details subtask. This new subtask contains read-only information about the delivery schedule for the requisition line.
- A new field, **Delivery Schedule Exists**, has been added to indicate whether or not a line has a delivery schedule.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

The following are the changes to this screen:

- Delivery Schedule subtasks has been added on the Quotes and RFQs subtasks. For new RFQs and quotes, values for these new subtasks are retrieved from the requisition line delivery schedule and remain editable. On this subtask is another subtask, Delivery Schedule Details, which displays the details from where the schedule originated and if the quote line or RFQ line has the **Combined Req Lines Exist** check box is selected.
- A new check box, **Reference Quote**, has been added to the Quotes subtask to indicate that the quote ID used exists in the system.
- On the Quotes subtask, if the **Require Valid Quote ID** (Configure Purchase Requisition Settings) check box is cleared, Costpoint displays both records from the requisition line quotes/requisition line quotes delivery schedule and quote header/quote line/quote line delivery schedule. Information displayed from the quote header/quote line/quote line delivery schedule are read-only, and if you need to change any information for the quote, then you can change them on the Manage Vendor Quotes by Vendor and Manage Vendor Quotes by Item screens. If the **Require Valid Quote ID** check box is selected, the subtask displays valid vendor quotes from the Manage Vendor Quotes by Vendor and Manage Vendor Quotes by Item screens.
- On the RFQs subtask, for new RFQ IDs and RFQ ID/RFQ lines that do not have existing consolidated requisition lines, this subtask is editable.
- The Awarded Quote ID lookup now filters by the requisition line's preferred vendor (if available).

These changes also apply to the Apply PO Info to Purchase Requisitions by Line (PPMRQLN) screen.

Manage Purchase Requisitions (PPMNTRQ1)

On the RFQs and Quotes subtasks, read-only Delivery Schedule subtasks have been added to display the delivery schedule for the requisition and the quote.

View Vendor Quotes (PPQVQT)

A new Delivery Schedule subtask has been added to the screen to display the delivery schedule for the quote line.

View Purchase Requisition Status (PPQRQSTS)

The Ref Quotes subtask has been renamed to Quotes subtask. Delivery Schedule subtasks have also been added to the RFQs and Quotes subtasks to display the delivery schedule for the RFQ line and the quote line.

View Item Purchasing Information (PPQITEM)

Delivery Schedule subtasks have been added to the RFQs and Quotes subtasks to display the delivery schedule for the RFQ line and the quote line.

Import Vendor Quotes (AOPQTV)

An input file for the quote line delivery schedule has been added to the preprocessor.

Manage Purchase Orders (POMMAIN)

You can now load the awarded quote line's delivery schedule when you select a quote from the lookup or enter a quote.

Print Request for Quotes (PPRPRRFQ)

You can now print the RFQ line delivery schedule from this screen. If the RFQ line has a delivery schedule, this information will be printed in an ascending order of the desired date.

If the RFQ line has a delivery schedule, then the desired date on the main RFQ line will not be printed.

Print the Desired Lead Time on RFQs

This feature allows you to print the desired lead time on a Request for Quote, so the vendor has an understanding of the required turnaround time at receipt of order.

Print Request for Quotes (PPRPRRFQ)

The Desired Lead Time-After Receipt of Order (ARO) is now included in the report when you print the request for quote.

Option to Update PO Line Original Due Date after Supplier Acceptance

This feature adds an **Acknowledgement Date** field to the PO line and includes a setting that gives users the option of whether or not to update the original due date if the line has already been acknowledged by the supplier. For Supplier Portal users, the **Implement Action Changes** button updates this new **Acknowledgment Date** field upon first acceptance of a PO Line. If that first acceptance involves a new proposed due date, the implementation of the changes also updates the **Original Due Date**. This change may be due to unrealistic date requests, or the supplier has not yet agreed to it; therefore, the supplier should not be held accountable. Any subsequent negotiations after initial acceptance will not update the **Original Due Date**. This lets you see if a supplier has delayed their due date from the original agreed upon date.

Configure Purchasing Settings (POMSET)

A new check box, **Allow Changes to PO line Original Due Date after acknowledgment**, has been added to allow edits to the original due date on the PO line and delivery schedules even after the line has been accepted by the vendor. This is selected by default for existing companies.

Set Up Company (SYPCOMP)

The application now copies values for the new **Allow Change to PO line Original Due Date after acknowledgment** check box in Configure Purchasing Settings from the original company when you create a new company by copying from an existing company.

Manage Purchase Orders (POMMAIN)

The following are the changes to this screen:

- A new **Acknowledgment Date** field has been added on the purchase order lines to let you save the date when the purchase order has been accepted by the supplier.

  PO line acknowledgment date can be entered by:

  - Loading from the PO header (right-click option).
  - Entering a date manually in the field.
  - Entering a date automatically in the field based on supplier portal actions of Accepted by Supplier. For actions of Change Request Accepted by Supplier or Change Request Accepted by Buyer, the update happens only when such actions are implemented by the buyer and the date was previously blank. This applies only when Supplier Portal is enabled for the PO vendor.

If the PO header **Acknowledgment Date** exists, this value will be defaulted to the PO line Acknowledgment Date, even though the supplier has not accepted it via the Supplier Portal. For a new PO or previously saved PO, the PO line Acknowledgment Date defaults to the value of the PO header Acknowledgment Date.

New lines added to a previously saved PO will initially have a blank Acknowledgment Date and can be manually entered or automatically loaded/updated when the supplier accepts it via the portal.

If you entered a value for the PO line acknowledgment date and **Allow Change to PO line Original Due Date after acknowledgment** is not selected, Costpoint alerts the user that the original due date will be disabled after save for the PO line and delivery schedules; otherwise, the original due date will be enabled. When you add a new PO line to a previously saved PO, the acknowledgment date is left blank to indicate that the PO line is yet to be accepted (and needs to be individually accepted) even though the saved PO has already been accepted.

If you change the PO header acknowledgment date from blank to non-blank (or vice versa), any existing PO line acknowledgment date will not be automatically updated. You can use the **Action** drop-down list to load the new header acknowledgment date to existing PO lines where this has been left blank.

> **Note:** Leave the PO header Acknowledgment Date blank if you intend to take action via the Supplier Portal.

If you are licensed for Supplier Portal and the PO vendor has the **Supplier Portal Enabled** check box selected in Manage Vendors, the original due date on the PO line and delivery schedule lines are kept synchronized until the PO line has been acknowledged by the supplier.

During initial Supplier Portal negotiations of the Purchase Order line, the Buyer or Supplier can submit a change request to propose a new due date or other changes. After the Supplier or Buyer accepts the change request, the Buyer can use the **Implement Action Changes** button in Manage Purchase Orders to update the Purchase Order line or delivery schedule line with the new proposed changes. If the PO line **Acknowledgment Date** is blank at this time, then when the Buyer clicks **the Implement Action Changes** button, the current date is entered into the PO line **Acknowledgment Date** field indicating acceptance. If a new due date was proposed and accepted, then both the Original Due Date and Due

Date are updated to that date. Any subsequent negotiations on the Due Date will not update the Original Due Date, so the buyer can see if the supplier altered the original agreed upon date.

The editability of the PO line/delivery schedule line's original due date also depends on the new **Allow Change to PO line Original Due Date after acknowledgment** check box in Configure Purchasing Settings. If this new check box is selected and the PO line has been accepted, you can edit the date; otherwise, editing is not allowed. For PO lines that do not have an acknowledgment date, editing of the original due date is allowed regardless of the option in the PO settings.

Create Purchase Order Change Orders (POMCHNG)

The application now uses the values of the **Acknowledgment Date** when creating a new change order.

Expedite Purchase Orders (POMEXPD)

The **Acknowledgment Date** field now displays the value from the PO line instead of the header information.

Archive Purchase Orders (POPARCH)

The application now copies the PO line **Acknowledgment Date** when archiving a PO.

Manage Buyers Actions (POMBACT)

A new field, **Acknowledgment Date**, has been added to the screen to display the PO line acknowledgment date.

When an action of **Change Request by Buyer** is implemented on the PO line or any associated delivery schedule line, this new field (when blank) will be updated accordingly.

> **Note:** This applies only to users who are licensed for Supplier Portal and when the **Supplier Portal Enabled** check box is selected for the PO vendor.

View Purchase Order Status (POQSTAT)

A new field, **Acknowledgment Date**, has been added to the screen to display the PO line acknowledgment date.

View Purchase Order Change Orders (POQCHNG)

A new field, **Acknowledgment Date**, has been added to the screen to display the PO line acknowledgment date.

Manage Supplier Actions (SPMSPACT)

When an action of **Accepted by Supplier** is implemented on the PO line or any associated delivery schedule line, this new field (when blank) will be updated accordingly.

> **Note:** This applies only to users who are licensed for Supplier Portal and when the **Supplier Portal Enabled** check box is selected for the PO vendor.

Single- to Multi-User Reports in Materials

This feature allows you to access/run reports in Post Inventory Journal, Post Sales Order Journal, and Compute/Print Purchasing Commitments while other users are also using the same application by having the transaction be arranged in a queue for processing.

For more information about this feature, see Improved Handling of Single User Processes

Post Inventory Journal (INPEDJNL)

The Post Inventory Journal (Action Menu) has been removed in relation to this enhancement.

Post Sales Order Journal (OEPPOST)

The Post Sales Order Journal (Action Menu) has been removed in relation to this enhancement.

Compute/Print Purchasing Commitments (POPCOMM)

You can now access/run reports on this screen simultaneously with other users by having the transaction be arranged in a queue for processing.

Reconcile Purchase Orders—Report of Changes

Reconcile Purchase Orders (POPRECON)

This feature allows you to generate a report to see the purchase order (PO) differences/discrepancies prior to running the Reconcile Purchase Orders utility. You can now see the discrepancies via the following reports:

- Reconciling receipt lines
- Reconciling PO lines quantity amount
- Reconciling PO line vouchered charges amount
- Reconciling header amount status
- Reconciling line released quantity amount
- Reconciling blanket header amount
- Subcontract Retainage purchase orders

Print PO Updates

This feature allows you to do the following:

- Meet compliance for FAR Clause 52.204-10 - Reporting Executive Compensation and First-Tier Subcontract Awards, and be able to decide whether or not to print the Vendor Unique Entity Identifier (UEI) number on the purchase order (PO).
- Print the vendor email address on the PO.
- Use options to include or exclude the PO header and line status on the printed PO.
- Default selection of the **Include Previously Printed** check box when you select a range of One on the Print Purchase Orders screen.
- Print the **Ship To** address on each PO line when the **Ship To** address differs for any line.

Configure Purchase Order Print Options (POMPOPTS)

Two new check boxes, **PO Status** and **PO Line Status**, have been added to the screen to print PO header status and PO line status on purchase orders and PO change orders.

Set Up Company (SYPCOMP)

The application now copies values for the new options in Configure Purchase Order Print Options from the original company when you create a new company by copying from an existing company.

Manage Purchase Orders (POMMAIN)

The following are the changes to this screen:

- A new field, UEI Number, has been added to the screen to display the PO vendor's Unique Entity Identification (UEI) value as specified in Manage Vendors.
- A new check box, Print UEI Number, has been added to the screen. If the vendor does not have a UEI number, this check box is disabled. When enabled, this check box is cleared by default for new purchase orders, and it is the responsibility of the user (buyer) to set this check box. If this check box is selected, the PO vendor's UEI Number will print on POs and PO change orders.

Print Purchase Orders (PORPPO)

The following are the changes to this screen:

- The **Include Previously Printed POs** check box is now selected by default when you select **One** in the PO range option.
- The generated report from this screen has been modified to:
  - Print the vendor's UEI Number if the Print UEI Number check box in the PO header (Manage Purchase Orders) is selected.
  - Print the vendor's contact email address from the PO header.
  - Print the PO header/PO line status (for each line), if the Print PO Status check box is selected in Configure Purchase Order Print Options.
    - For a pending or void PO/ void PO line, the status will still be printed whether the PO Status check box is selected or not in Configure Purchase Order Print Options.
  - Include **Date Printed** on top of the report.
  - Print the ship ID on the first line instead of the header, for PO lines with different ship IDs.
  - Not print the ship ID for PO lines with void status.

Print Purchase Order Change Orders (PORPCO)

The generated report from this screen has been modified to:

- Print the vendor's UEI Number if the Print UEI Number check box in the PO header (Manage Purchase Orders) is selected.
- Print the vendor's contact email address from the PO header.
- Print the PO header status, if the Print PO Status check box is selected in Configure Purchase Order Print Options.

- Print the PO line status for each line, if the PO Line Status check box is selected. For a void PO line, the status will still be printed whether the PO Status check box is selected or not in Configure Purchase Order Print Options.
- Not print the ship ID on the header, for PO lines with different ship IDs on the current change order. If a ship ID on any PO line has changed between the From and To change orders, both ship IDs will be printed whether all the lines have the same ship ID or not.
- Not print the ship ID for PO lines with void status, unless the ship ID has changed between the From and To change orders.

DPAS Rating on PO Lines, Printed PO, and Supplier Portal Emails/Screens

This feature enables you to view the Defense Priorities and Allocations System (DPAS) rating on the Purchase Order screens at the PO line level based on Projects selected on the Accounts subtask. It also allows you to choose to print the DPAS rating for each purchase order (PO) line, and this option will be enabled/disabled based on a new PO Total Amount threshold setting. The DPAS rating will also be included in the Supplier Portal screens and emails at the PO line level if **Print Option** is selected. A DPAS rating indicator is also available on the Buyer and Supplier dashboards to help prioritize DPAS-rated PO Lines.

Configure Purchase Order Print Options (POMPOPTS)

The **Prime Contract Number** check box has been renamed **Prime Contract Number/DPAS Rating**. If this check box is selected, the Prime Contract Number prints for each PO line account with an existing project which has a prime contract number; the same applies for the DPAS rating. This check box also affects the **FAR Clause Message for Priority Projects** check box, which prints only if the DPAS rating is also printed on the PO/PO lines. You can also choose to not print the FAR clause even if you are printing the DPAS rating by clearing the **FAR Clause Message for Priority Projects** check box.

In addition, an option to set a PO total amount threshold limit, **DPAS Rating Print Threshold (Func Curr)**, has been added. The amount indicated in this field determines the automatic printing of the **Prime Contract Number/DPAS Rating** on all of the PO lines regardless of the status of the **Prime Contract Number/DPAS Rating** check box. The default value for this field is 0.00. And if the PO total amount is greater than or equal to the amount specified, then the **Print Prime Contract Number/DPAS Rating** check box will automatically be selected and disabled for all the lines of a PO.

If there is a value in this field and the PO total amount is less than the amount specified, then the default for the **Print Prime Contract Number/DPAS Rating** check box in the PO line (Manage Purchase Orders) defaults to the selection in Configure Purchase Order Print Options and is editable. When you use the threshold to determine printing of the DPAS rating, it is recommended that you clear the **Print Prime Contract Number/DPAS Rating** check box so the threshold drives the PO line print option rather than it defaulting from this setting.

If this field is left blank, then the PO line **Prime Contract Number/DPAS Rating** check box is editable.

Set Up Company (SYPCOMP)

The new **DPAS Rating Print Threshold (Func Curr)** field in Configure Purchase Order Print Options will be included when setting up a new company.

Manage Purchase Orders (POMMAIN)

A new check box, **Print Prime Contract Number/DPAS Rating**, has been added to the PO line on this screen. If the PO total amount is greater than or equal to the **DPAS Rating Print Threshold (Func Curr)**,

then this check box is automatically selected and disabled for all the lines in the respective PO; otherwise, this check box defaults to the selection in Configure Purchase Order Print Options and is editable. If the **DPAS Rating Print Threshold (Func Curr)** field is blank, then this check box is editable.

In addition, a new field, **DPAS Rating**, has been added to the PO line and Accounts subtask to display this information for the respective PO. This rating defaults from the DPAS rating of the Project ID that is entered on the PO line. If multiple accounts with different projects and DPAS ratings exist, they will all be displayed in a comma-separated list. In this scenario, when you select to print the DPAS rating, all DPAS ratings will display on the printed PO and Supplier Portal emails and screens.

Note: The DPAS rating is a read-only field where values are retrieved from the project(s) linked to the PO line accounts, and the value could change anytime. If the DPAS rating for a particular project changes at any given point after the PO has been released to the supplier, it will be the user's/buyer's responsibility to inform the supplier that the priority for a particular PO/PO line changes via the Action Notes.

Create Blanket Purchase Order Releases (POMRELS)

A new check box, **Print Prime Contract Number/DPAS Rating**, has been added to the screen. For new releases, if the PO total amount is greater than or equal to the **DPAS Rating Print Threshold (Func Curr)** amount, then the **Print Prime Contract Number/DPAS Rating** check box is automatically selected and disabled for the released PO; otherwise, it defaults to the value of the of the same check box in Configure Purchase Order Print Options but remains editable for PO lines in the generated released PO. If this check box is selected, the DPAS rating will be printed on the PO and included in the Supplier Portal emails and screens for the supplier to understand the priority rating.

In addition, a new field, **DPAS Rating**, has been added to the PO line Release Details tab to display this information for the respective PO. This rating defaults from the DPAS rating of the Project ID that is entered on the PO line, and if multiple accounts with different projects and DPAS ratings exist, they will all be displayed in a comma-separated list. In this scenario, when selected to print the DPAS rating, all DPAS ratings will display on the printed PO and Supplier Portal emails and screens.

Expedite Purchase Orders (POMEXPD)

A new read-only check box, **Print Prime Contract Number/DPAS Rating**, has been added to the screen. The value defaults to the selection in Configure Purchase Order Print Options. On the PO details and PO Line Accounts subtask, a **DPAS Rating** field has been added as well. For PO lines with multiple account distribution, the DPAS rating in the PO lines displays all the DPAS ratings from the PO Line Accounts subtask.

Create Purchase Order Change Orders (POMCHNG)

For a new change order with a PO total amount that is greater than or equal to the **DPAS Rating Print Threshold (Func Curr)**, the **Print Prime Contract Number/DPAS Rating** check box is automatically selected and disabled for the change order PO; otherwise, the check box defaults to the same check box in Configure Purchase Order Print Options and is editable for PO lines in the change order PO. If this check box is selected and a change was made to the projects or DPAS rating(s), the DPAS rating will be printed on the Purchase Order Change Order and included in the Supplier Portal emails and screens for the supplier to understand the priority rating.

Note: If the change in the purchase order will cause the PO total amount to be greater than or equal to the **DPAS Rating Print Threshold (Func Curr**), then the **Print Prime Contract No/DPAS Rating** check box for all other lines of the PO (even if there is really no change in the PO line information) will automatically be selected and disabled. The change in the check box should be included on the report and trigger an email notification to the Supplier Portal.

Print Purchase Order Change Orders (PORPCO)

If the **Print Prime Contract Number/DPAS Rating** check box is selected on the PO line, then the Prime Contract **Number and/or DPAS Rati**ng is printed on the report, if the number/rating exist for the record. This check box also affects the **FAR Clause Message for Priority Projects** check box, which prints only if the DPAS rating is also printed on the PO/PO lines. You can also choose to not print the FAR clause even if you are printing the DPAS rating by clearing the **FAR Clause Message for Priority Projects** check box.

These changes also apply to the following screens:

- Print Purchase Order Expediting Report (POREXPD)
- Print Purchase Orders (PORPPO)

Update Subcontract Retainage PO Status (POMSCST)

A new check box, **Print Prime Contract Number/DPAS Rating**, has been added to print the Prime Contract Number/DPAS rating on the PO line. If the PO total amount is greater than or equal to the **DPAS Rating Print Threshold (Func Curr)**, then this check box is automatically selected and disabled for all the lines in the respective PO; otherwise, this check box defaults to the selection in Configure Purchase Order Print Options and is editable. If the **DPAS Rating Print Threshold (Func Curr)** field is blank, then this check box is editable.

In addition, a new field, **DPAS Rating**, has been added to the PO line and PO Line Accounts subtask to display this information for the respective PO. This rating defaults from the DPAS rating of the Project ID that is entered on the PO line. If multiple accounts with different projects and DPAS ratings exist, they will all be displayed in a comma-separated list. In this scenario, when you select to print the DPAS rating, all DPAS ratings will display on the printed PO and Supplier Portal emails and screens.

View Item Purchasing Information (POQITEM)

The following are the changes to this screen:

- **Print Prime Contract Number/DPAS Rating**: This read-only check box defaults to the value of the check box with the same name on the PO line of Manage Purchase Orders.
- **DPAS Rating**: This read-only field (PO line and Accounts subtask) defaults to the project's DPAS rating in the PO line child transaction window (CTW). For PO lines with multiple account distribution, the DPAS rating in the PO lines displays all the DPAS ratings from the PO Line Accounts subtask.

View Purchase Order Status (POQSTAT)

The following are the changes to this screen:

- **Print Prime Contract Number/DPAS Rating**: This read-only check box on the PO Line Accounts subtask defaults to the value of the same check box in Manage Purchase Orders.

- **DPAS Rating**: This read-only field (Purchase Order Lines and PO Line Accts subtasks) defaults to the project's DPAS rating in the PO line CTW. For PO lines with multiple account distribution, the DPAS rating in the PO lines displays all the DPAS ratings from the PO Line Accounts subtask.

View Purchase Order Change Orders (POQCHNG)

The following are the changes to this screen:

- **Print Prime Contract Number/DPAS Rating**: This read-only check box on the Old CO Line and Current CO Line subtasks defaults to the value of the same check box in Configure Purchase Order Print Options.
- **DPAS Rating**: This read-only field (Current CO Line subtask) defaults to the project's DPAS rating in the PO line child transaction window (CTW). For PO lines with multiple account distribution, the DPAS rating in the PO lines displays all the DPAS ratings from the PO Line Accounts subtask.

Create Purchase Orders (PPPGPO)

For generated PO/PO lines, if the PO total amount is greater than or equal to the **DPAS Rating Print Threshold (Func Curr)**, then the **Print Prime Contract Number/DPAS Rating** check box is automatically selected and disabled for all the lines; otherwise, the **Print Prime Contract Number/DPAS Rating** check box defaults to the same check box in Configure Purchase Order Print Options and is editable. If this field is left blank, then the **Prime Contract Number/DPAS Rating** check box is editable. The DPAS rating of the PO defaults from the DPAS rating of the project related to it.

Buyer Dashboard (PODBUYER)

A DPAS rating indicator is now included in the following dashparts:

- Open Purchase Orders
- Pending Buyer Action (by Purchase Order)
- Pending Release to Supplier (by Purchase Order)

The **DPAS** column displays **Y** if the **Print Prime Contract Number/DPAS Rating** check box is selected and a DPAS rating exists for at least one of the PO lines.

Manage Buyer Actions (POMBACT)

A new field, **DPAS Rating**, has been added to the screen. When the **Print Prime Contract Number/DPAS Rating** check box is selected on the PO Line in Manage Purchase Orders and a DPAS rating exists, this rating displays on the Supplier Portal screens and emails; otherwise, the rating should not be included in the emails and screens. For multiple PO line accounts, all unique DPAS ratings are displayed. For PO lines where **Print Prime Contract Number/DPAS Rating** is selected but without a DPAS rating, this information does not display in the Supplier Portal emails or supplier-facing screens.

Supplier Portal Dashboard (SPDSP)

A DPAS rating indicator is now included in the following dashparts:

- Open Purchase Orders
- Pending Supplier Action (by Purchase Order)

The **DPAS** column displays **Y** if the **Print Prime Contract Number/DPAS Rating** check box is selected and a DPAS rating exists for at least one of the PO lines.

Manage Supplier Actions (SPMSPACT)

A new field, **DPAS Rating**, has been added to the screen. When the **Print Prime Contract Number/DPAS Rating** check box is selected on the PO Line in Manage Purchase Orders and a DPAS rating exists, this rating displays on the Supplier Portal screens and emails; otherwise, the rating should not be included in the emails and screens. For multiple PO line accounts, all unique DPAS ratings are displayed. For PO lines where **Print Prime Contract Number/DPAS Rating** is selected but without a DPAS rating, this information does not display in the Supplier Portal emails or supplier-facing screens.

Manage Shipping Information (SPMSHIP)

A new field, **DPAS Rating**, has been added to the screen. If the PO line has multiple account distribution, then the DPAS rating in the PO lines CTW display all DPAS ratings from the PO Line Accounts subtask. The DPAS rating will not be displayed for PO lines where the **Print Prime Contract Number/DPAS Rating** check box is not selected.

Archive Purchase Orders (POPARCH)

When Costpoint archives a PO, Costpoint also archives the **Print Prime Contract Number/DPAS Rating** check box setting.

UDT02 Integration

This feature supports the real-time integration between Costpoint and Time & Expense (T&E), and to prevent deletion of records from Costpoint that are used as dependent date in Time & Expense.

Manage Manufacturing Orders (PCMMOMNT)

For T&E that is co-deployed with Costpoint, this application now restricts deletion of a manufacturing order used in T&E records. If the MO is not used in T&E records, but exists in charge tree records in T&E, you will receive an information message and Costpoint automatically deletes it from the charge tree, when MO is deleted.

If the **MO Allow Additional Timesheet Charges** option is changed from selected to cleared, upon save, automatically set the corresponding charge tree row to inactive in T&E.

UDT04 Work Center

This feature restricts the deletion of a work center if it is used in a T&E transaction.

Manage Work Centers (RUMWCM)

For T&E that is co-deployed with Costpoint, this application now restricts deletion of a work center if it is used in T&E records. If the work center is not used in T&E records, but exists in charge tree records in T&E, you will receive an information message, and Costpoint automatically deletes it from the charge tree when the work center is deleted.

UDT07 MO Routing

This feature restricts the deletion of an MO routing if it is used in a T&E transaction.

Manage Manufacturing Orders (PCMMOMNT)

For T&E that is co-deployed with Costpoint, this application now restricts deletion of an MO routing line if it is used in T&E records. If the MO routing line is not used in T&E records, but exists in charge tree records in T&E, you will receive an information message and Costpoint automatically deletes it from the charge tree, when the MO routing is deleted.

DPAS Rating on Manufacturing Order Documents

This feature helps you decide whether or not to print the DPAS rating on Manufacturing Order Documentation so that production can properly schedule their orders according to the DPAS Rating and avoid possible violations of government requirements.

Configure MO Documentation Print Options (PCMPRTOP)

A new check box, **Print DPAS Rating**, has been added to the screen to set a default to print the DPAS rating on the MO Pick List, MO Assembly Sheet, and/or MO Routing Traveler Report, or the Component Shortage Report.

Manage Manufacturing Orders (PCMMOMNT)

A new field, **DPAS Rating**, has been added to the screen to display the DPAS rating from the Build Project on the Manufacturing Order screens.

This change also applies to the Expedite Manufacturing Orders (PCMMEXPD) screen.

Print Manufacturing Order Documentation (PCRMODC)

A new check box, **Print DPAS Rating**, has been added to the screen to print the DPAS rating on the MO Pick List, MO Assembly Sheet, and/or MO Routing Traveler Report(s). The default value is from the Configure MO Documentation Print Options screen, but remains editable.

Print Manufacturing Order Component Shortage Report (PCRSHRT)

A new check box, **Print DPAS Rating**, has been added to the screen to print the DPAS rating on the component shortage report. The default value is from the Configure MO Documentation Print Options screen, but remains editable.

View Manufacturing Order Status (PCQMOST)

A new field, **DPAS Rating**, has been added to the screen to print the DPAS rating from the Build Project on the Manufacturing Order screens.

View Part Inventory (PCQPINV)

A new field, **DPAS Rating**, has been added to the screen to display the DPAS rating from the Build Project on the Manufacturing Order screens.

Set Up Company (SYPCOMP)

The DPAS Rating has been included when setting up a new company.

Cycle Count Enhancement

This feature allows you to do the following:

- Create a cycle count schedule of all parts from a certain period of time utilizing a standard or Shop Floor calendar to calculate incremental count sheets for the number days in that period of time, ABC Classification frequency, and Count Intervals.
- Assign ABC Classifications based on a cumulative value of the part.
- Update the Last Count Date on Inventory Transactions.
- Separate routine cycle counts and annual counts so that when doing annual counts, the last count date will not be updated and does not affect/reset cycle count dates.
- See a warning flag indicating that the part number is currently in a cycle count when other staff may be trying to perform another transaction (for example issue).
- Perform physical inventory counts on a part or part range to reduce time spent on reconciling the particular part when it may exist in multiple locations.
- The Manage Actual Counts screen is updated to allow editing of the Counter and Control Prefix as well as adding fields for **Counted Date**, **Count Entered By and Date**, **Reconciled By and Date**, **Variance Amt**, **Unit Cost** and **Notes**.
- Sort the Control Number sequentially on the Print Physical Count Sheets screen.
- Indicate whether a warehouse uses cycle counts or not, and include only the cycle count warehouses on the Count and ABC Classification screens.

Configure Inventory Settings (INMSET)

The following are the changes to this screen:

- Re-arranged the fields/check boxes on the screen to put cycle/physical count-related options in one group box.
- A new check box, **Provide warning for parts with active Cycle Count,** has been added to the screen to provide warning in various transactions if the part is currently included in an active count.
- A new group box, **Update Last Count Date**, has been added to the screen. This group box contains the new options for updating the last count date for a part, revision, inventory abbreviation, warehouse, and location combination.
- A new check box, **Standard Physical Counts**, has been added in the **Update Last Count Date** group box. If you select this check box, the last count date will be updated for counts done via the standard physical count for that warehouse/location. If you clear this check box, counts done via the Standard Physical Count setup will not update the Last Count Date for that warehouse/location.
- A new check box, **Inventory Transactions**, has been added in the **Update Last Count Date** group box. If this check box is selected, the last count date will be updated for the warehouse/location if the transaction adds quantity to an existing row with a location quantity of zero (0), or adds a new row. If this check box is cleared, the Last Count Date will not be updated. This check box affects the following applications:
  - Manage Purchase Order Receipts (RCMPORC)
  - Enter Miscellaneous Inventory Receipts (RCMMSRC)
  - Manage Quality Control Inspections (RCMINSP)
  - Enter Issues to Project/Accounting/Org or PO (INMPAISS)
  - Manage Sales Order Inventory Issues (OEMISSU1)

- Enter Manufacturing Order Issues (PCMMOISS)
- Enter Scrap Adjustments (INMSCADJ)
- Enter Inventory Transfers (INMPAXFR)
- Enter Location Transfers (INMLOXFR)
- Manage Vendor Returns (RCMRTRN)
- Enter Manufacturing Order Reliefs (PCMRELMO)
- Create Mass Inventory Transfers (INPMSXFR)
- Import Inventory Transactions (AOPINTRN)

Set Up Company (SYPCOMP)

The application now copies the values of the new check boxes in Configure Inventory Settings from the original company when you create a new company from an existing company.

Manage Warehouses (INMWHSE)

A new check box, **Cycle Counts**, has been added to the screen to differentiate it from the existing option used for standard physical counts. In addition, a new option to indicate if the warehouse uses cycle counts has been added. For warehouses that do not use cycle counts, inventories from the warehouse locations are excluded when you create cycle counts and update ABC classification. You also won't be able to use the warehouse in setting up Part Warehouse ABC classification information.

Update ABC Classifications (INPPCABC)

A drop-down list, **Basis**, has been added to the Classification Percentages group box to specify the basis for grouping inventory into ABCDE classifications. Two options are available from the drop-down list:

- **Number of Parts**: If you select this option, the percentages of ABCDE class parts will be based on the number of parts included in the calculation.

  For example, if there are 1000 parts, and you specify A = 10%, A will be assigned to the first 100 rows (ranked in descending value), regardless of the value of parts.

- **Cumulative Value**: If you select this option the percentages of ABCDE class parts will be based on the cumulative value (amount) associated with the parts.

  For example, if there are 1000 parts totaling $1,000,000, and you specify A = 10%, A will be assigned to the ranked parts until the Cumulative % reaches $100,000 (which is 10% of $1million), regardless of the number of parts.

For either option, the value of the parts included is calculated the same way using the Cost Method and ABC Classification Type you selected on the screen. The parts are then listed in descending rank amount order, rank percent, and cumulative percent.

In addition, when you do a lookup, warehouses with Cycle Counts not selected will be excluded from the result values.

Manage Cycle Counts Schedules (INMCCSCH)

This new application (**Materials » Inventory » Physical Counts » Manage Cycle Count Schedules**) has been added to enable you to create and manage schedules that are warehouse specific for parts to be cycle counted one or more times over a specified date range. For a given warehouse, there can be multiple schedules as long as the Schedule Start/End Dates do not overlap. The application validates the information based on existing Schedule Dates at the line level. This application uses the tables:

- CC_SCH_LN
- CC_SCH_HDR

Create Physical Count (INPPHYS)

The following are the changes to this screen:

- A new radio button, **Cycle Count Schedule**, has been added to create a cycle count based on an existing cycle count schedule. When creating a physical count from a cycle count schedule, all schedule rows where the **Count Created** check box is cleared, and with a schedule date that is less than or equal to the Physical Count date will be included in the count.
- A new selection range, **Part/Rev**, has been added to the screen to determine what parts are to be included in the generated standard physical or cycle count. If the Count Type is Cycle Count Schedule, the range defaults to **All** and cannot be edited.
- The lookup for the **Warehouse** field has been changed to display only warehouses enabled for Cycle Counts when creating a Cycle Count. For counts being created from a Cycle Count Schedule, the lookup will display all warehouses with a valid cycle count schedule for the current date based on the start/end date of the schedule. If you manually enter a warehouse with a schedule that does not cover the current date, you will encounter an error.

Manage Physical Counts (INMPCLST)

A new field, **Count Type**, has been added to the screen to indicate if the count is Cycle Count, Standard Physical, or Cycle Count Schedule. A new **Schedule** field has also been added to specify the cycle count schedule corresponding to the cycle count when the **Count Type** is **Cycle Count Schedule**.

Manage Actual Counts (INMPCACT)

The following are the changes to this screen:

- New fields have been added to the screen:
  - **Count Type**: This field indicates if the count is **Cycle Count**, **Standard Physical**, or **Cycle Count Schedule**.
  - **Schedule**: This field indicates the cycle count schedule corresponding to the cycle count when the **Count Type** is **Cycle Count Schedule**.
  - **Counted by**: This is an existing field that indicates the employee ID of the person who performed the count. This initially defaults from the header but can now be edited.
  - **Counted Date**: This field indicates the date when the counter actually counted the parts. This initially defaults from the header Counter Date, but this can be edited to report the actual date when it was counted.
  - **Reconciled by**: This field indicates the person who reconciled the entered count by displaying the valid employee ID.
  - **Reconciled Date/Time**: This field indicates the date/time when the count was reconciled.
  - **Count Entered By**: This field indicates the person who entered the count into the system. This could be a different person from the one who performed the count, or the person who actually created the count row.
  - **Count Entered Date/Time**: This field indicates the date/time when the count was entered into the system. This date can be different than the date/time when the row was actually entered into the system.

- **Variance Amount**: This field indicates the total impact on the inventory value due to the variance quantity.
- **Unit Cost**: This field indicates the cost of the item.
- **Notes**: Use this field to enter any notes regarding the actual count, variance quantity, variance amount, or reason for recount.
- **Auto Count/Auto Reconcile**: These buttons default line values for **Counted By**, **Counted Date**, **Counted Entered By**, **Count Entered Date/Time**, **Reconciled By**, and **Reconciled Date/Time**.

- The **Counter** field has been renamed to **Default Counter** to indicate that this defaults to edited lines.
- Logic has been added based on/related to the new **Standard Physical Counts** check box in Inventory Settings.

Print Physical Count Sheets (INRPHYS)

The following are the changes to this screen:

- A new option has been added in the 1st Sort drop-down list to sort the report by Control Number.
- A new 2nd Sort drop-down list has been added to indicate how the report will be sorted after the first sort is selected. The options are the same as the 1st Sort.
- Validation has been added to disallow the same value for the 1st and 2nd Sort and depending on the combination of the 1st and 2nd Sorts, the report layout varies.
- A new field, **Cycle Count Schedule**, has been added to indicate the cycle count schedule for which count sheets are to be printed.

Manage Parts (PDMPART)

The screen now disallows rows in Part Warehouse if the cycle count for the warehouse is not selected.

Manage Purchase Order Receipts (RCMPORC)

This application has been modified to provide a warning message if an active count exists for the transaction line part/revision and when the option to provide a warning (**Provide warning for parts with active Cycle Count** check box) is selected. In addition, the application now updates the last count date (**Inventory Transactions** in the **Update Last Count Date** group box) for the inventory location based on a new setting in Configure Inventory Settings.

Now, if this setting is selected and you add quantity to an existing row of a transaction with a location quantity of zero (0) or add a new row, the last count date for the warehouse/location is updated. If cleared, the last count date will not be updated.

These changes also apply to the following screens:

- Enter Miscellaneous Inventory Receipts (RCMMSRC)
- Manage Quality Control Inspections (RCMINSP)
- Manage Vendor Returns (RCMRTRN)
- Enter Issues to Project/Account/Org or PO (INMPAISS)
- Enter Scrap Adjustments (INMSCADJ)
- Enter Inventory Transfers (INMPAXFR)

- Enter Location Transfers (INMLOXFR)
- Import Inventory Transactions (AOPINTRN)
- Enter Manufacturing Order Issues (PCMMOISS)
- Enter Manufacturing Order Reliefs (PCMRELMO)
- Manage Sales Order Inventory Issues (OEMISSU1)

Create Mass Inventory Transfers (INPMSXFR)

The application now updates the last count date (**Inventory Transactions** in the **Update Last Count Date** group box) for the inventory location based on a new setting in Configure Inventory Settings.

New Shelf-Life Fields to the Item Preprocessor

This feature allows you to use the preprocessor to import part shelf-life details.

Import Items (AOPITEM)

This change allows you to add Shelf Life information in the input file.

Detailed Part Schedule Displays the MRP Exception Action Messages for Any Order

This feature allows you to see if a Detailed Part Schedule has any MRP Exception Action Messages for a specific order and visualize a simulation of the Detailed Part Schedule lines if those Action Messages were to be implemented.

Configure Materials Requirements Planning Settings (MRMSET)

A new check box, **Apply MRP Suggestions to Part Schedule**, has been added to the screen. Use this new check box to view detailed part schedule based on existing actual supply order information, or with suggested quantity and due dates from MRP action messages. A similar option is available on the Manage Detailed Part Schedule screen, where it is editable.

Set Up Company (SYPCOMP)

The application now copies values from the original company to a new company for the new options in Configure Materials Requirement Planning Settings.

Manage Detailed Part Schedule (MRMDTPT)

A new check box, **Apply MRP Suggestions to Part Schedule**, has been added to the screen. Use this new check box to view detailed part schedule based on existing actual supply order information, or with suggested quantity and due dates from MRP action messages. This defaults from the Configure Materials Requirements Planning Settings screen, but is editable on this screen. To support the use of the new check box, the application now loads part schedule with MRP suggestions applied, if the new option is selected. Additional fields have also been added to show existing order quantity/dates along with the suggested quantity/dates because the actual displayed available dates/quantities could come from either source.

BI Enhancements to Materials Reports and Dashboards

This feature provides updates to the Procurement dashboard and report filters and prompts, as well as includes a PO Remaining Balance Report and Vendor Exclusion List Report. It also includes a Smart AI package for Supplier Performance and data model updates to add new data and user-defined fields. A new Work Center dispatch tab has also been added to the Manufacturing Dashboard to help you view MO Operations that are in queue, upcoming, or not yet scheduled for a specific work center.

New Procurement, Manufacturing, and Materials Data in Data Models

New feature data has been added to the data models, so you can use that data to create reports or dashboards. This data includes the following:

- Supplier Portal data, such as PO Line Action History, Shipment data, Invoice Action History, and RFQ/Quote Action History
- PO Line NAICS codes and Vendor Classification data
- Vendor UEI Number, GovWin IQ Synch Date, Exclusion List data, and Digital Signature and Supplier Portal flags
- New RFQ/Quote Requisitions ID and Delivery Schedule data
- New Inventory Count data
- Materials UDEF fields

MO Production Status Report Updates

Costpoint Manufacturing Business Intelligence (BI) now shows the required, reserved, and issued quantity on the MO Build-To Inv Abbrev drill thru from the MO Production Status Report. Also, on the MO Production Status Report, the Percent Complete prompt now defaults to 0, which allows you to search for open non-completed MOs without having to always change this prompt.

Report Enhancements

The following are the BI enhancements to Materials reports and dashboards:

- Purchase Order
  - The PO line delivery schedule now prints on the PO.
  - The PO header notes now print above the PO line section.
  - A PO type filter on the Purchase Order Report is now available to narrow down results.
- Procurement Dashboard
  - A PO type filter is now available on the Procurement Dashboard to narrow down results.
  - A drill-thru report from the PO Status chart is now available on the Procurement Dashboard to show PO details.
- Purchase Requisition Changes
  - The Requisitions Pending report has been renamed to Requisitions Pending PO Conversion, so that it is more descriptive of the purpose of the report.
  - The approver's employee name, date of approval, and approval notes now print on the requisitions and approved requisitions drill-thru reports.

- Manufacturing and materials reports (which contain a part filter) are now filtered by company when the **Separate Items by Company** check box is not selected.
- Manufacturing Dashboard Changes: You can now view the Order Status and Lead Time from the MO Build Part on the MO Production Status Drill-Thru report, so you can compare your in-status time to the actual lead time.

Vendor Exclusion List Report

You can now generate a report of purchase orders that have vendors flagged as active on the Sam.gov exclusion list. The Exclusion List indicator and warnings were added in 8.0, but this new report will help you track changes to vendors with open POs so you can take appropriate action.

PO Payment & Remaining Balance Report

You can now generate a report to see a one-line view of the Purchase Order total amount, payments made from cash disbursements, voucher info, and remaining balance details on the PO payment lifecycle.

Manufacturing Dashboard—Dispatch Tab

A Work Center Dispatch tab is now available on the Manufacturing dashboard. On this tab, you can see the MOs by work center that are active, upcoming, or not scheduled, which gives you a clear view of your work center's workload.

An MO can have several operations listed in the MO_ROUTING table, and they can each be in a different work center. The goal of this dashboard is to show which operations are being worked on, upcoming, or not yet scheduled for a specific work center.

Supplier Performance Smart AI Package

A Supplier Performance data module has been added to the Smart AI functionality so you can look at Purchase Order and Receipt data for delivery status as well as rejections to determine supplier performance. A Supplier Performance dashboard is also included to help you determine which suppliers to utilize based on On-Time, Early, and Late delivery percentages as well as rejection percent. Also visible are total spend by Vendor and the average costs for the top 25 purchased parts, which can be filtered by Vendor.

Streamline Workflows with Flyout Navigation Banners

To help eliminate the need to remember complex processes and to make it easier to navigate a workflow, Costpoint provides you the option to use a navigation fly-out banner as a guide from **My Menu**. The navigation banner, which displays at the top of an application screen, is made of application links displayed in the order of a process flow. This feature will provide you with default UI profiles for buyers, planners, and sellers to access standard Materials Management navigation banners in **My Menu**.

You can access **My Menu** by clicking on the upper-left portion of your screen. Provided that you have authorization, you can modify your **My Menu** settings in Configure User Preferences where navigation banners can be copied and edited for customization or you can setup your own workflow.

For more information on this feature, see Streamline Workflows with Flyout Navigation Banners.

Progressive Web Application (PWA) Updates

This feature allows mobile device users of Costpoint to experience easy, intuitive, and efficient use of Costpoint applications in landscape view.

Manage Invoices (SPMINVC)

The following are the changes to this screen:

- The **Fiscal Year**, **Period** and **Subperiod** fields are now hidden because these are payer info and won't mean much to the supplier. These fields have also been removed from the Query option.
- The **Trans Currency**, **Terms**, and **Shipment Number** fields have been moved below the PO info fields, within the same group box.
- The **Invoice Control Number** and **Approved (A/P)** fields have been moved within the **Invoice info** group box.

Approve Purchase Requisitions (PPMRQAPX)

The following are the changes to this screen:

- The **Query** box no longer automatically loads upon navigation to the application. Now, all requisitions that the user is scheduled to approve are loaded.

The **Status** and **Rejection Reason** fields were moved up so they display in the header, along with **Total Req Amount** and **Req Approval Notes** for easier approval with fewer taps.

For more information on this feature, see Progressive Web Application.

Time & Expense

This section describes version 8.1 enhancements for Costpoint Time and Expense.

Enhanced Integration of Costpoint and Time & Expense

Time & Expense installations that are co-deployed with Costpoint now read directly from the Costpoint tables for UDTs (01–11) across all domains.

Note: The changes described in this section apply only to Time & Expense systems that are co-deployed (share everything) with Costpoint. Stand-alone versions of Time & Expense are unaffected.

Warning: Following the installation of version 8.1, Administrators must run a one-time post-installation upgrade process to populate Costpoint tables with data from Time & Expense.

Until you run the process from the **Time & Expense » Configuration » Utilities » Toolkit Controls** screen, users may receive error messages related to unrecognized account and project IDs. The Toolkit corrects these issues. See the "Toolkit for Post-Upgrade Migration of T&E Data to Costpoint" section within this document for more information.

Note also that following the installation, System Administrators must also configure options on the new Integration Settings tab in **Time & Expense » Configuration » General Controls » General Settings** screen. See the "New Integration Settings Tab" section below for more information.

Benefits of the enhancement include:

- Elimination of the requirement to manually export and import UDT data between the systems, which was accomplished by adding missing Time & Expense fields to the Costpoint tables, such as account, project, pay type, and so forth.
- Data Lookups in user applications, such as project and account codes on timesheets, are provided directly from Costpoint.

Outside of the post-installation requirement described above, there are no other implementation requirements. However, Administrators should be aware that:

- Certain UDT Links are no longer supported. See "UDT Links Not Supported" for details.
- Configuration options that were previously set during the creation of export files now require one-time configuration within Time & Expense. See "New Integrations Settings Tab" for details.
- Some functions, including New, Copy, and Delete, were removed from the UDT screens within Time & Expense. See "Changes to UDT Applications in Time & Expense" for details.

UDT Links Not Supported

In co-deployed systems, the following UDT links are no longer supported:

- **Link 17**: UDT01/UDT07 (Account/PLC)
- **Link 93:** UDT09/UDT03 (Link Organization/Labor Location)

Following the installation of version 8.1, the **Link UDT01/UDT07** and **Link UDT09/UDT03** fields on the UDT Options tab of **Time & Expense » Configuration » General Controls** screen are disabled and the value displays as **None**.

New Integration Settings Tab

An Integration Settings tab was added to **Time & Expense » Configuration » General Controls**. The tab displays only in co-deployed systems. Select this tab to designate:

- Values from Costpoint that will display in the **Description** field of the UDT 02 screen.
- Values from Costpoint that will map to the **User-Defined Codes** (1-3) of the UDT01/UDT02 screens.

Prior to the integration, these settings were managed from **People » Labor » Timesheet Interface » Export Data to Deltek Time and Expense**, and the values were inserted into the export file. Because the export now happens on the backend, the configuration is now managed from within Time & Expense.

To configure the integration settings, click the **Time & Expense » Configuration » General Controls » Integration Setting** tab.

UDT 02 Build Descriptions

On the UDT 02 screen of Time & Expense, the value that displays in the **Description** field for either projects or manufacturing orders (MOs) can be built from existing field values in Costpoint.

Under **Project Build Description**, select the **Project Name** drop-down list to configure the project description. Choose from the following options:

Option	Description
None	Choose this option to leave the **Description** field empty.
Project Level	This is the default value. Leave this option selected to display the project's name based on the level.
Top Level/Project Level	Choose this option to display the project's top-level project and the name of the project.
Project Long Name	Choose this option to display the value that exists in the **Long Name** field on the Details tab of **Projects » Project Setup » Project Master » Manage Project User Flow**. Note that this field is new in version 8.1. See "Project Long Name" for more information.

Under **MO Build Description**, select the **Manufacturing Order Name** drop-down list to configure the MO description. Choose from the following options:

Option	Description
None	Choose this option to leave the **Description** field empty.
Use Build Part ID	This is the default value. Leave this option selected to use the build part ID as the description. When this option is selected, the build part ID is appended to the build project ID to form the description.

Option	Description
Use Build Part Description	Choose this option to use the description of the build part as the description here. When this option is selected, the build part description is appended to the build project ID to form the description.

Project (UDT02) Field Mapping

There are three User-Defined fields that you can directly map to specific fields on the **Projects » Project Setup » Project Master » Manage Project User Flow** screen in Costpoint.

After the field is mapped, the value can be selected on the UDT02 screen of Time & Expense.

Under **Project Mapping**, select the **User Defined** drop-down list to configure the mapping for that field. Choose from the following options:

Option	Description
None	This is the default setting. Leave this option selected if you do not want to map the field to Costpoint.
Owning Org	Choose this option to map the field to **Owning Org** on the Basic Info tab of the Manage Project User Flow screen.
Project Classification	Choose this option to map the field to **Project Classification** on the Basic Info tab of the Manage Project User Flow screen.
Customer	Choose this option to map the field to **Customer** on the Details tab of the Manage Project User Flow screen.
Account Group	Choose this option to map the field to **Account Group** on the Basic Info tab of the Manage Project User Flow screen.
Abbreviation	Choose this option to map the field to **Abbreviation Classification** on the Basic Info tab of the Manage Project User Flow screen.

Account (UDT01) Field Mapping

There are three User-Defined fields that you can directly map to specific fields on the **Accounting » General Ledger » Accounts » Manage Accounts** screen in Costpoint.

After the field is mapped, the value can be selected on the UDT01 screen of Time & Expense.

Under **Account Mapping**, select the **User Defined** drop-down list to configure the mapping for that field. Choose from the following options:

Option	Description
None	This is the default setting. Leave this option selected if you do not want to map the field to Costpoint.
Entry Group	Choose this option to map the field to **Account Entry Grp** of the Manage Accounts screen.

Option	Description
Account Type	Choose this option to map the field to **Project Classification** on the Basic Info tab of the Manage Project User Flow screen.

Changes to UDT Applications in Time & Expense

This section describes changes to each UDT application under **Time & Expense » Configuration » Master Data**.

General changes that apply to all Time & Expense UDT applications include:

- Add, Copy, and Delete buttons are hidden. UDTs can only be modified from within Costpoint.
- Basic information fields, such as the ID and Description, are now read-only.

Changes specific to each of the UDT application are described below.

UDT 01

Changes specific to UDT 01 are described in the following table.

Screen Area	Field	
Header	Basic information fields are now read-only.	
General	Type	Read-only.
	Active	Read-only.
	Interim Charge	Hidden.
	Line Level Approval	No change.
Dates	**Date Edit**	No change.
	Override Start/End Date	This new field displays in co-deployed installations only. If this check box is clear, the values that display in **Start Date** or **End Date** populate directly from the Fiscal Year/Period Information section of the **Accounting » General Ledger » Accounts » Manage Accounts** screen. To override the default dates from Costpoint, select this check box, if you have rights to the application. After you select the check box, **Start Date** and **End Date** are enabled for editing. You can either select new dates or clear the fields to leave them empty. If you overwrite the dates and later clear this check box, the dates from the Manage Project User Flow screen in Costpoint are automatically restored.
	Start Date	Click to the right of the field to select the start date of the UDT01. Employees will not be able to charge

Screen Area	Field	
		time before the start date. This field is always editable in stand-alone Time & Expense installations. In co-deployed systems, this field is not editable, unless **Override Start/End Dates** is selected. If that check box is clear, the date value populates from the FY Starting and PD Starting values on the Manage Accounts screen in Costpoint.
	End Date	Click to the right of the field to select the end date of the UDT01. Employees will not be able to charge time before the start date. This field is always editable in stand-alone Time & Expense installations. In co-deployed systems, this field is not editable, unless **Override Start/End Dates** is selected. If that check box is clear, the date value populates from the FY Starting and PD Starting values on the Manage Accounts screen in Costpoint.
	Inactive Date	No change.
Links	The check boxes in this section are no longer editable. They will be selected (checked) by default if the UDT 01 links check boxes (links 12 or 19) on the **Time & Expense » Configuration » General Controls » UDT Options** tab are configured as either **Direct** or **Wildcard**. Note that linking of UDT01 and UDT07 is no longer allowed in co-deployed systems. Therefore, the **PLC Required** and **PLC Links** check boxes are hidden.	
User Defined	No changes to fields in this section. Values that display these fields are now configured from the new Integration Settings tab in **Time & Expense » Configuration » General Controls**.	

Note: Data for this screen now pulls directly from Costpoint and can only be modified from **Accounting » General Ledger » Accounts » Manage Accounts**.

UDT 02

Changes specific to UDT 02 are described in the following table.

Screen Section	Field	
Header	Basic information fields are now read-only.	
General	**Type**	Read-only.
	Active	Read-only.

Screen Section	Field	
	Allow Charging	Read-only.
	Interim Charge	Field is now hidden.
	Line Level Approval	No change.
Dates	**Date Edit**	No change.
	Override Start/End Date	This new field displays in co-deployed installations only. If this check box is clear, the values that display in **Start Date** or **End Date** populate directly from the Fiscal Year/Period Information section of the **Projects » Project Setup » Project Master » Manage Project User Flow** screen. To override the default dates from Costpoint, select this check box, if you have rights to the application. After you select the check box, **Start Date** and **End Date** are enabled for editing. You can either select new dates or clear the fields to leave them empty. If you overwrite the dates and later clear this check box, the dates from the Manage Project User Flow screen in Costpoint are automatically restored.
	Start Date	Click to select the start date of the UDT02. You can edit this field at any time. Employees will not be able to charge time before the start date. This field is always editable in stand-alone installations of Time & Expense. In co-deployed systems, this field is not editable, unless **Override Start/End Dates** is selected. If that check box is clear, the date value populates from **Projects » Project Setup » Project Master » Manage Project User Flow**.
	End Date	Click to select the end date of the UDT02. You can edit this field at any time. Employees will not be able to charge time after the end date. This field is always editable in stand-alone installations of Time & Expense. In co-deployed systems, this field is not editable, unless **Override Start/End Dates** is selected. If that check box is clear, the date value populates from **Projects » Project Setup » Project Master » Manage Project User Flow**.
	Inactive Date	No change.
Links	The check boxes in this section are no longer editable. They will be selected (checked) by default if the UDT 02 links check boxes (links 12, 27, or 29) on the	

Screen Section	Field
	Time & Expense » Configuration » General Controls » UDT Options tab are configured as either **Direct** or **Wildcard**.
User Defined	No changes to fields in this section. Values that display in these fields are now configured from the new Integration Settings tab in **Time & Expense » Configuration » General Controls**.

Note: Data for this screen now pulls directly from Costpoint, and depending on how UDT02 was configured, the data can only be modified from either of the following:

- **Projects » Project Setup » Project Master » Manage Project User Flow**
- **Materials » Production Control » Manufacturing Orders » Manage Manufacturing Orders**

UDT 03

All fields on this screen are now read-only. The Query dialog box opens when you launch the application.

UDT 09 Subtask link was removed. Linking of an Org ID and Labor Location/Local (link 93) is not supported in co-deployed systems.

Note: Data for this screen now pulls directly from Costpoint and can only be modified from **People » Labor » Labor Rate Controls » Manage Labor Locations/Locals**.

UDT 04

All fields on this screen are now read-only, and the Query dialog box opens when you launch the application.

Data for this screen now pulls directly from Costpoint and records can only modified from there.

Note that the **Rate** field is no longer available.

Note: Data for this screen now pulls directly from Costpoint, and depending on how UDT04 was configured, the data can only be modified from either of the following:

- **Materials » Routings » Work Centers » Manage Work Centers**
- **Accounting » General Ledger » Reference Numbers » Manage Reference Elements**

UDT 05

All fields on this screen are now read-only, and the Query dialog box opens when you launch the application.

Data for this screen now pulls directly from the **Activity Type** field on the Manufacturing Order Timesheet Information subtask of the **Costpoint » People » Labor » Timesheet Entry Creation » Manage Timesheets** application. When export is automatically run from Time & Expense to Costpoint, it exports to either the Run or Setup code established under **Activity Type**.

Note: Data for this screen now pulls directly from Costpoint and can only be modified from **Accounting » General Ledger » Reference Numbers » Manage Reference Element**.

UDT 06

All fields on this screen are now read-only, except for the **Active** check box, which remains editable.

Note: Data for this screen now pulls directly from Costpoint and can only be modified from **People » Labor » Labor Rate Controls » Manage General Labor Categories**.

UDT 07

All fields on this screen are now read-only, except for the **Active** check box, which remains editable.

Additional screen changes are described in the following table.

Screen Area	Field	
Override	**Rate 1**	Removed. Not supported in co-deployed systems.
	Rate 2	Removed. Not supported in co-deployed systems.
UDT01 Subtask	Removed. The linking of UDT01 with UDT07 (link 17) is not supported in co-deployed systems.	

Note: Data for this screen now pulls directly from Costpoint, and depending on how UDT07 was configured, the data can only be modified from either of the following:

- **Projects » Project Setup » Project Labor » Manage Project Labor Categories (PLC)**
- **Materials » Production Control » Manufacturing Orders » Manage Manufacturing Orders**

UDT 08

All fields on this screen are now read-only, except for the **Active** check box, which remains editable.

Note: Data for this screen now pulls directly from Costpoint and can only be modified from **People » Labor » Labor Controls » Manage Workers' Compensation Codes**.

UDT 09

All fields on this screen are now read-only, and the Query dialog box opens when you launch the application.

The UDT03 subtask link was removed, because the linking of UDT09 with UDT03 (link 93) is not supported in co-deployed systems.

Note: Data for this screen now pulls directly from Costpoint and can only be modified from **Accounting » General Ledger » Organizations » Manage Organization Elements**.

UDT 10

Changes to specific to UDT 10 are described in the following table.

Screen Area	Field	
Header	Fields in the header are read-only.	
General Options	Overtime	Field is now read-only.
	Overtime Type	This field only displays if **Overtime** is selected, indicating that this is an overtime pay type. Choose from the following options: ▪ **Level 1**: Choose this option to designate this as a level 1 overtime type. ▪ **Level 2**: Choose this option to designate this as a level 2 overtime type. The designation of the level is used by Time & Expense when populating the Level 1 and Level 2 Lookups in the new Overtime Mappings section, which is used to map regular pay types that count toward overtime to the correct charge, when overtime is automatically distributed.
	Cost Only	Field is now read-only.
	Comment Required	No change.
	Active	No change.
	Prorate	No change.
	Future	No change.
	Overtime UDTI0	No change.
	Labor Recast UDTI0	Field is hidden. Not supported in co-deployed systems.
	Payroll Recast UDTI0	Field is hidden. Not supported in co-deployed systems.
Overtime Mappings	New screen section. Fields in this section are only enabled for regular, non-overtime pay types. If the **Overtime** check box is selected, these fields are disabled. Use this section to map regular pay types that count towards overtime to a specific level 1 and/or level 2 overtime pay type. This information is used by Time & Expense if overtime is automatically calculated and distributed. For example, if a regular pay time counts towards overtime, the overtime pay type to which it is mapped will be charged for any overtime that does occur. ▪ **Level 1:** Use this field to map regular pay types that count towards overtime to the appropriate level 1 overtime pay type. Click Lookup to select the pay type.	

Screen Area	Field	
	Level 1 is dependent on the value of the rate 1 factor, a type which has an overtime factor of less than 2 but greater than 0. The Lookup list only displays overtime pay types that are level 1. If a value exists in this field, and you then select the **Overtime** check box, the existing value is cleared from this field. ▪ **Level 2:** Use this field to map regular pay types that count towards overtime to the appropriate level 2 overtime pay type. The factor is greater than or equal to 2. See "Automatic Overtime Calculation" for related feature information.	
Rate Options	Rate 01	Field is now read-only.
	Rate 02	Field is hidden. Not supported in co-deployed systems.
Labor Payroll Options	Labor Code	Field is hidden. Not supported in co-deployed systems.
	Payroll Code	Field is hidden. Not supported in co-deployed systems.
	Payroll Earnings Code	No change.
	Payroll Mapping	No change.

Note: Data for this screen now pulls directly from Costpoint and can only be modified from **People » Labor » Labor Rate Controls » Manage Pay Types**.

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All fields on this screen are now read-only, and the Query dialog box opens when you launch the application.

Note: Data for this screen pulls directly from the State system table within Costpoint.

Toolkit for Post-Upgrade Migration of T&E Data to Costpoint

Warning: This topic contains vital information for System Administrators regarding post-upgrade steps that are required to finalize the installation of Costpoint version 8.1. Failure to complete the post-upgrade steps will cause errors related to unrecognized account and project IDs.

Due to enhanced integration between Costpoint and Time & Expense for co-deployed installations, a **Time & Expense » Configuration » Utilities » Toolkit** application was added to enable System Administrators to migrate existing data from Time & Expense to Costpoint after installing version 8.1.

Options on the Toolkit screen support three features that are new for this release, including:

- Time & Expense installations that are co-deployed with Costpoint now read directly from the Costpoint domain tables for UDTs (01-11) across all Costpoint domains.

The Toolkit transfers existing values from the Time & Expense tables to the appropriate tables in Costpoint, where columns were added on the backend to store the data. To learn more about this enhancement, see "Enhanced Integration of Costpoint and Time & Expense."

- Maintenance of functional role codes and descriptions are now maintained on the new Manage Functional Roles (SYMROLE) screen in Costpoint.

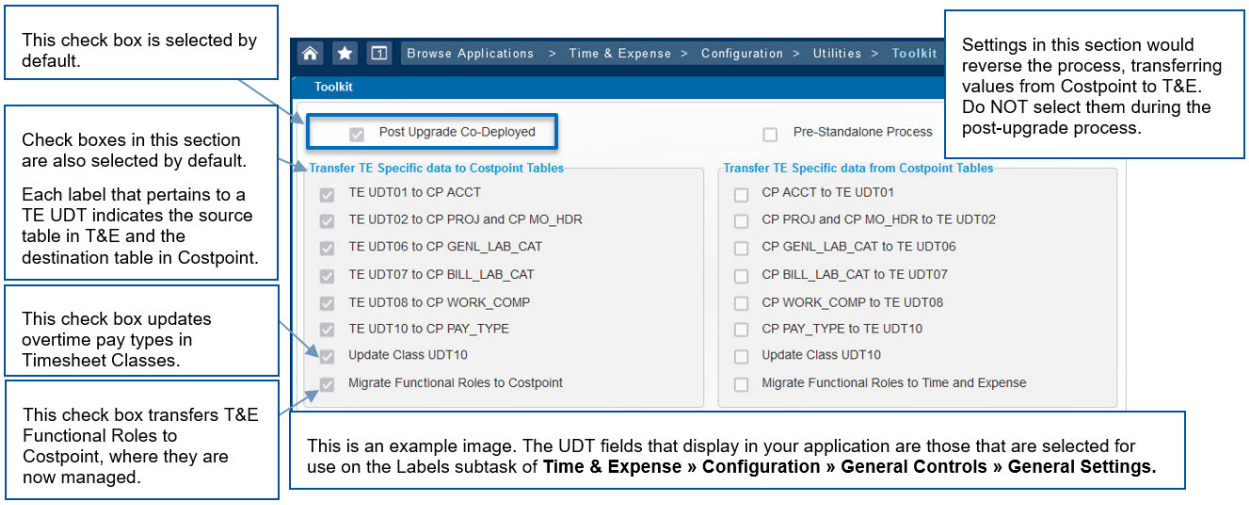
  The Toolkit transfers existing Time & Expense Functional Roles (UDT02_SPVSRs) to Costpoint. To learn more about this enhancement, see:

  - "Costpoint Functional Roles" in the Time & Expense section.
  - "Managing Functional and Project Roles" in the Projects Section.

- Related to a new feature for the automatic calculation of overtime, the UDT 10 (Pay Types) application includes new Level 1 and Level 2 overtime fields that are updated during installation based on overtime factor details maintained in Costpoint.

  The Toolkit updates the overtime pay types on the Pay Types Links subtasks of the Timesheet Classes screen with these same changes. To learn more about this enhancement, see "Pay Types Subtask Updates" in the Automatic Overtime Calculation section.

The first time you open the Toolkit screen, the check boxes on left-hand side of the screen under **Transfer TE Specific Data to Costpoint** are selected by default, as shown in the example image below.



Following the installation of version 8.1, do the following to run the Toolkit:

1. Click **Time & Expense » Configuration » Utilities » Toolkit**.
2. On the Toolkit screen, confirm that:
   - The **Post Upgrade Co-Deployed** check box is selected.
   - All the check boxes under **Transfer Specific TE Data to Costpoint** are selected.
3. On the Process menu, click **Action Menu » Execute Toolkit**.

   Process dialog boxes display that indicate the progress of each action being processed.

> **Note:** The above task is a one-time requirement following the upgrade to version 8.1, and the Toolkit is designed to process the selected settings only a single time.
>
> If you re-run the Toolkit with the same settings selected, the utility produces an error message stating that the process failed. This occurs because the utility cannot run if the settings were already successfully processed.

For your reference, the table below shows the application path of the destination tables in Costpoint.

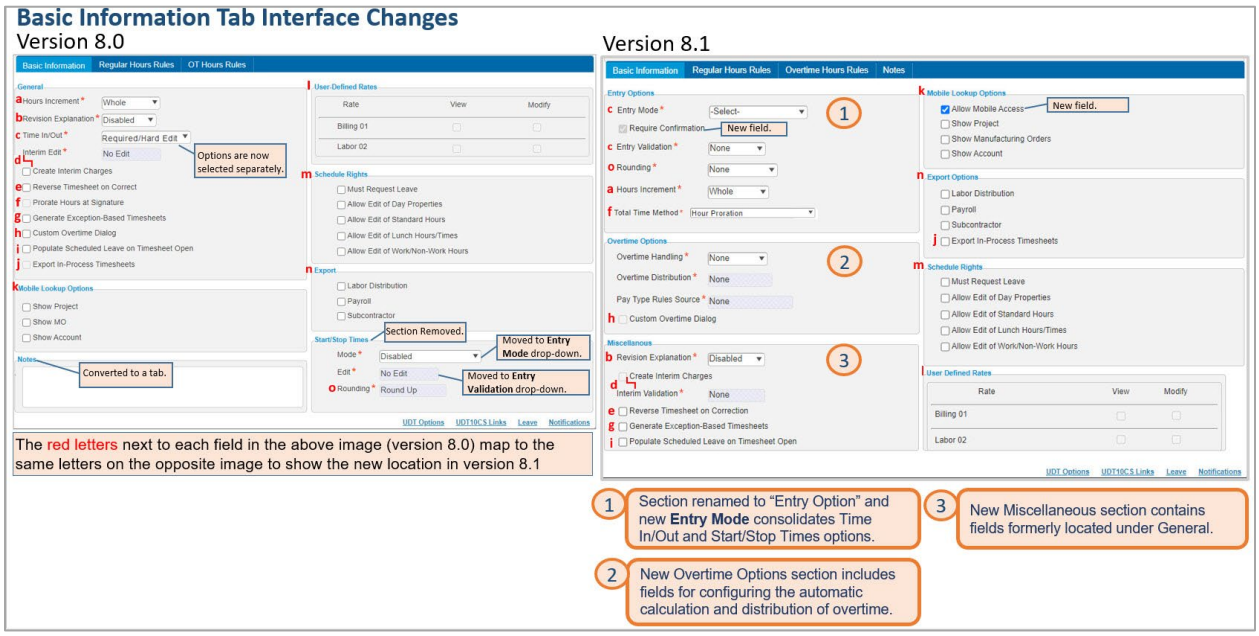
UDT Check Box in Toolkit	Full Path of Destination Application in Costpoint
TE UDT01 to CP Account	**Accounting » General Ledger » Accounts » Manage Accounts**
TE UDT 02 to CP Proj and CP MO_Hdr	▪ **Projects » Project Setup » Project Master » Manage Project User Flow** ▪ **Materials » Production Control » Manufacturing Orders » Manage Manufacturing Orders**
UDT 06 to CP GENL_LAB_CAT	**People » Labor » Labor Rate Controls » Manage General Labor Categories**
UDT 07 to CP BIL_LAB_CAT	▪ **Projects » Project Setup » Project Labor » Manage Project Labor Categories (PLC)** ▪ **Materials » Production Control » Manufacturing Orders » Manage Manufacturing Orders**
TE UDT08 to CP WORK_COMP	**People » Labor » Labor Controls » Manage Workers' Compensation Codes**
TE UDT10 to CP PAY_TYPE	**People » Labor » Labor Rate Controls » Manage Pay Types**

Timesheet Class User Interface Updates

The Basic Information tab of the **Time » Time Controls » Timesheet Classes** screen was redesigned to enhance usability, and a number of settings were added in support of several new features.

See "New Fields and Functionality Updates" below to learn about new fields and functionality changes.

Refer to the following image for a visual guide to screen layout changes:



New Fields and Functionality Updates

The table below describes new fields and other updates to existing settings.

Field	Description
Entry Mode	This new field consolidates options that were previously configured separately. Entry Mode refers to the type of time entry that is required for the timesheet class, such as whether employees are only required to enter standard hours worked, or whether they must also enter shift start and stop times, track breaks and meals, or also record start and stop times at the charge level. **Conversion Note:** Following the upgrade to version 8.1, the value in this field is automatically updated for all Timesheet Classes based on existing 8.0 values. ▪ **Standard Entry Option** This option displays if the timesheet class was not previously configured for Time In/Out or Start/Stop Times. In version 8.0, **Standard** did not exist as a separate option. It was enabled on the backend by default if **Time In/Out** and **Mode** (under Start/Stop Times) were both set to **Disabled**. Now that all three types of time entry are consolidated under **Entry Mode**, Standard was added as separate an option. After you upgrade to version 8.1, it displays automatically for any timesheet class where it previously operated by default on the backend. ▪ **Time In/Out Entry Options** In version 8.0, **Time In/Out** was a separate field, which was set to either **Disabled**, **Optional**, or **Required**. When selected as **Optional** or **Required**,

Field	Description

	the validation level (Hard Edit, Soft Edit, or No Edit) was integrated with the option itself (for example, Optional/Hard Edit or Required/Hard Edit).
	
	In version 8.1, the options that enable the Time In/Out functionality are separate from the options that enable the validation level (see the "Entry Validation" field description below for additional information).
	
	Due to the consolidation of all entry modes into a single list, the Time In/Out options (**Required** or **Optional**) are now prefaced by the word "Attendance."
	
	For timesheet classes that are configured for Time In/Out, one of the following options displays in **Entry Mode** after you upgrade to version 8.1:
	
	▪ **Attendance Optional**: This option displays if any of the following were selected from **Time In/Out** in version 8.0:
	  ○ Optional/Hard Edit
	  ○ Optional/Soft Edit
	  ○ Optional/No Edit
	▪ **Attendance Required**: This option displays if any of the following were selected from **Time In/Out** in version 8.0:
	  ○ Required/Hard Edit
	  ○ Required/Soft Edit
	  ○ Required/No Edit
	
	▪ **Start/Stop Time Entry Options**
	
	In version 8.0, Start/Stop Time functionality was enabled under **Start/Stop Time**, where **Mode** was set to either **Disabled**, **Break**, **Break Summary**, **Break/Detail Work**.
	
	If a timesheet class in version 8.0 was configured for Start/Stop Time, one of the following options displays in **Entry Mode** after you upgrade:
	
	▪ **Break Tracking**: This option displays if **Break** was selected in version 8.0. This option enables employees to enter start/stop times for meals and breaks.
	▪ **Start/Stop Detail**: This option displays if **Breaks/Detail Work** was selected in version 8.0. This option enables employees to enter start/stop times for meals, breaks, and work hours at the charge level.
	▪ **Start/Stop Summary**: This option displays if **Breaks/Summary Work** was selected in version 8.0. This option enables employees to enter start/stop times for meals, breaks, and work hours but not at the charge level.
	
	Because the options for enabling Start/Stop Time are now consolidated under **Entry Mode**, the Start/Stop Time section was removed. The **Edit** and **Rounding** fields were relocated under **Entry Options**.
	
	Note: The **Edit** field was renamed to **Entry Validation**. See the "Entry Validation" field description below.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Require Confirmation</td><td>This new check box is enabled only if Entry Mode is selected as Attendance Required or Attendance Optional.

The check box is selected by default and enables the Confirm Time Entries check box on the Time In/Out subtask of the timesheet. The presence of the check box requires employees to verify that the times entered are correct before they click Apply to save them.

If you clear Require Confirmation, resources are allowed to save entries without confirming them, but the setting is selected by default on the backend.</td></tr>
<tr><td>Entry Validation</td><td>This setting determines what occurs when a timesheet entry fails a validation.

This field was previously named Edit. For improved clarity, items on the drop-down list were also renamed as described in the table below.
<table>
<tr><th>Version 8.0 Name</th><th>Version 8.1 Name</th><th>System/User Action (no change)</th></tr>
<tr><td>No Edit</td><td>None</td><td>The resource is not alerted when an entry fails a validation.</td></tr>
<tr><td>Soft Edit</td><td>Warning</td><td>The resource is alerted when an entry fails a validation but can sign the timesheet without correcting it.</td></tr>
<tr><td>Hard Edit</td><td>Error</td><td>The resource is alerted when an entry fails a validation and is required to correct it before signing the timesheet.</td></tr>
</table>
Conversion Note: For timesheet classes that were configured as Time In/Out or Start/Stop Time, Entry Validation is updated with the existing 8.0 value as follows:
▪ Time In/Out: The value is derived from Time In/Out. For example, if Required/Hard Edit was selected, Entry Validation is set to Error.
▪ Start/Stop Time: The value is derived from Edit under Start/Stop Times. For example, if Soft Edit was selected, Entry Validation is set to Warning.

Note: For any timesheet class where Entry Mode is set to Standard, Entry Validation is set to None.</td></tr>
<tr><td>Overtime Options (New Section)</td><td>This section was added for version 8.1 and includes new fields for configuring the automatic calculation and distribution of overtime.

See “Automatic Overtime Calculation” to learn about these fields and other changes related to this enhancement.</td></tr>
</table>

Field	Description
Allow Mobile Access	This new setting enables you to control access to the Mobile Time applications at the Timesheet Class level. See "Control Access to Costpoint Mobile T & E by Timesheet or Expense Class" section for details.

Automatic Overtime Calculation

Time entry was enhanced to provide an automated process for calculating and distributing overtime.

Prior to this enhancement, overtime had to be manually entered on the timesheet in a manner that ensured it was calculated correctly for payroll and charged appropriately for labor distribution.

This enhancment automates the process of calculating and distributing overtime by allowing resources to enter all their hours on the timesheet as regular, and then based on new configuration options, including new settings mapping regular pay types to overtime pay types, the overtime is automatically calculated and distributed to the correct charges after the timesheet is signed.

Conversion Note: It is important to note that this feature is *not* automatically configured or deployed following the upgrade to version 8.1. You are therefore able to decide whether you want to enable and configure the feature by timesheet class. During the upgrade, however, some new fields are updated with existing values from your Time & Expense system. Throughout these release notes, you will see "Conversion Notes" added where this information is brought to your attention.

Overview of Implementation Decisions

The decision process for choosing whether to enable this feature includes considerations such as those described in the table below.

Decision Points	Notes
Implement the feature.	For timehseet classes where overtime is currently configured, decide whether you want overtime automatically calculated and distributed. Read sections within these release notes for implementation.
Use pay type rules on the UDT 10 screen or timesheet class	After reviewing information on how regular pay types are mapped to overtime pay types, decide whether you will use the Pay Types screen or the Pay Type Rules subtask on the Timesheet Class screen as the source for the pay types that will be used when distributing overtime.
Conduct employee training	If you decide to enable automatic overtime calculation, employees should be trained in advance that they no longer need to enter overtime on their timesheets. They may also need training on how to use the new Charge Distribution subtask. See " New Charge Distribution Subtask " at the end of these release notes. If you enable and configure this feature for a timesheet class, the automatic calculation and distribution of overtime occurs only if no manual overtime entries exist on the timesheet when it is signed.

Decision Points	Notes
	There is no system-level option that prevents manual entry of overtime on the timesheet, and once overtime is manually entered, calculation and distribution does not occur.
Limit employee access to overtime pay type on their timesheets	You can control access to overtime pay types if you clear the **Allow Lookup** and **Allow Manual Entry** check boxes on the Pay Type Links subtask of the Timesheet Classes screen. Alternatively, you may decide to remove overtime pay types from the subtask. If neither option is viable for your company, employees should understand the circumstances under which manual entry of overtime is either desirable or not desirable.

Note: Currently, overtime is calculated only after the timesheet is signed. In a future release, the functionality will be enhanced to calculate and display the overtime following each save and then perform the final calculation after signing. Also planned for a future release is the ability to distribute the overtime to a different project.

Overview of Applications Updated

The following table provides a high-level overview of the areas of Time & Expense that were updated for this feature. For each item described below, see section references for greater detail.

Area Modified	Overview of Changes	
Time » Time Controls » Timesheet Classes	**Basic Information Tab**	This tab includes a new **Overtime Options** section. Fields in this section determine whether: ▪ Automatic overtime calculation is on or off for the selected timesheet class. ▪ Overtime is distributed according to daily, weekly, or per punch rules. ▪ The source for overtime pay types is the timesheet class or Pay Types application. See "Basic Information Tab Updates" below for details.
	Overtime Hours Rules Tab	This tab includes new sections for configuring overtime for holidays, Saturdays, and Sundays. In addition, other existing settings were updated or removed. See "Overtime Hours Rules Tab Updates" below for details.
	Pay Type Links Subtask	This subtask includes new fields for mapping regular pay types, those that count towards overtime, to the appropriate Level 1 and Level 2 pay type that will be used for calculating and distributing overtime. You will use these settings if you decide to make the timesheet class the source of the overtime pay types.

Area Modified	Overview of Changes
	See "Pay Type Links Subtask Updates" for details.
Time » Timesheets » Timesheet	Changes to this area include: ▪ A Charge Distribution subtask link displays on the timesheet if overtime is configured to calculate automatically, and if overtime hours are detected when the timesheet is signed. The subtask displays the number of hours removed from the regular pay types entered on the timesheet and the overtime pay types to which the hours are distributed. See "Timesheet Updates for End-Users" below for details. ▪ New validation warning and errors related to holiday, Saturday, and Sunday overtime configuration will display if configured to do so.
Time » Timesheets » Manage/Approve Timesheets	The Charge Distribution subtask was also added to this application.
Configuration » Master Data » UDT10	This screen includes a new drop-down list for overtime pay types that indicates whether it is Level 1 or Level 2. It also includes a new Overtime Mapping section, where regular pay types are mapped to the appropriate overtime pay type (Level 1 and Level 2) to use when calculating and distributing overtime hours. These settings are used for automatic overtime calculation if you designate the Pay Types screen as the source of the pay type rules. See "Pay Types (UDT10) Application Updates" for details.
Configuration » General Controls » Account Types	A **Distribute Calculated Overtime** check box was added. When a charge (PTO, for example) is configured to count towards overtime, this new setting allows the administrator to control whether overtime assigned to a charge will also be distributed to the charge. If the check box is cleared, overtime is not distributed to the charge. See "UDT01 Types Application Updates" for details.
Time » Time Utilities » Change Timesheet Status	The utility was updated to include validation and distribution changes related to timesheet signing. See "Change Timesheet Status Utility Updates" for details.
Configuration » Interfaces » Import Master Data	The import will be updated to reflect any column changes. Updates to this area apply to stand-alone installations only. See "Time & Expense Import Changes" for details.
Time » Time Interfaces» Export Timesheet	See "Timesheet Export Changes" for details.

Overview of Implementation Requirements

To implement this feature for a timesheet class, the primary requirements of configuration include:

- Configure fields under Overtime Options on the Basic Information tab of **Time » Time Controls » Timesheet Classes.**
- Review and configure new overtime validation settings on the Overtime Hours Rules tab of **Time » Time Controls » Timesheet Classes**. Note that some selections on this screen also affect default values in the Overtime Options section.
- After you decide whether the source of the pay types is either the timesheet class or the Pay Types application, map the regular pay types that count towards overtime to the appropriate overtime pay type.

Timesheet Classes Configuration Updates

This section describes new settings added to **Time » Time Controls » Timesheet Classes** that you will use to configure how overtime will be handled in your Time & Expense system.

Basic Information Tab Updates

This section describes updates to the Basic Information tab related to the automatic calculation and distribution of overtime.

> **Note:** See also "Timesheet Class User Interface Updates" for detailed description of many other interface improvements that were made to the Basic Information tab. This section only discusses changes to that tab that related to the automatic calculation of overtime.

New options for configuring the automatic calculation and distribution of overtime display in the **Overtime Options** section of the Basic Information tab. These new fields are described in the table below.

Field	Description
Overtime Handling	Use this new setting to determine how overtime is handled for the selected timesheet class when timesheets are entered. **Conversion Note:** After you upgrade to version 8.1, this setting reflects current overtime handling for the timesheet class and is set to either: ▪ **None**: The timesheet class is not currently configured for overtime. ▪ **Validate**: The timesheet class is configured for overtime and validation is enforced. Options for this setting include: ▪ **None:** When this option is selected, automatic overtime calculation and distribution is turned off, and overtime entries are not validated on the timesheet. (This is the default setting for new timesheet classes.)

Field	Description
	▪ **Validate:** When this option is selected, overtime entries on the timesheet are validated according to overtime rules, but overtime is not automatically calculated or distributed. ▪ **Calculate:** Choose this option if you want Time & Expense to automatically calculate and distribute overtime hours. **Conversion Note:** Following the upgrade to version 8.1, you must manually apply this change to any timesheet class for which you want to enable automatic overtime calculations. When **Calculate** is selected, employees need only enter regular hours, and overtime is automatically calculated after the timesheet is signed. Selecting **Calculate** also enables the new Charge Distribution subtask link in the Timesheet application. The subtask link displays on the timesheet after it is signed and if overtime is calculated.
Overtime Distribution	**Note:** Following the installation of version 8.1, this field is set to **None** and disabled for all timesheet classes. It is only enabled if you set **Overtime Handling** to **Calculate**. When overtime is automatically calculated, Time & Expense distributes the hours by moving them from the regular pay type to the mapped overtime pay type based on either a daily, weekly, or per punch distribution method. **Note:** Time & Expense distributes hours from regular to overtime only if the regular pay type counts towards overtime and is mapped to an overtime pay type (level 1 and/or level 2). See the **Pay Type Rules Source** field description below. After you set **Overtime Handling** to **Calculate**, choose one of the following options for distributing the overtime: ▪ **None**: Choose this option if you want overtime calculated but not distributed automatically. ▪ **Daily**: This is the default value when **Overtime Handling** is selected as **Calculate**. When this option is selected, overtime is calculated based on a daily threshold. For example, if the threshold per day is 8 hours, and 12 are entered for a given day, then 4 hours are distributed to overtime. When overtime hours are distributed on a daily basis, Time & Expense handles the labor distribution by spreading the hours to the charge with the least number of hours first and the one with the most number of hours last. For any given day where overtime occurs, all regular charges that count towards overtime, and which are mapped to an overtime pay

Field	Description
	type (either level 1 or level 2), receive some portion of the hours so that the amount is distributed evenly across the pay types. Charges on the last day are plugged if necessary. Note that when **Daily** is selected or defaulted as the overtime handling option, it cannot be changed if the following settings on the Overtime Hours Rules tab are set to either Error or Warning: ▪ Daily Overtime ▪ 7 Consecutive Day Overtime ▪ Holiday Overtime ▪ Saturday Overtime ▪ Sunday Overtime ▪ **Weekly**: Select this option if overtime is calculated based on a weekly hours threshold on the Overtime Hours Rules tab. For example, if the threshold per week is 40 hours, and 44 are entered for a given week, then 4 hours are distributed to overtime. When overtime hours are distributed on a weekly basis, Time & Expense handles the labor distribution by first calculating how many hours to distribute to each day based on the number of hours that count towards overtime as compared to the total for the week. All regular charges that count towards overtime, and which are mapped to an overtime pay type (either level 1 or level 2), receive some portion of the hours so that the amount is distributed evenly across days and pay types. If necessary, hours on the last day are rounded and plugged. ▪ **Per Punch**: This option is valid only if **Entry Mode** is selected as **Start\Stop Detail**. When this option is selected, Time & Expense performs the distribution based on hours in the timesheet cell. The distribution is much the same as daily, but at a more granular level.
Pay Type Rules Source	**Note:** This field is disabled if **Overtime Handling** is selected as **None**. This setting determines the source of the pay type rules used during the calculation and distribution of overtime. Options include: ▪ **Pay Type**: This is the default setting if Overtime Handling is selected as either **Calculate** or **Validate**. Leave this option selected to have Time & Expense refer directly to the overtime mapping configured on the **Configuration » Master Data » UDT10** screen. **Note:** See "Pay Types (UDT 10) Application Updates " for details on new mapping fields.

Field	Description
	▪ **Timesheet Class**: Choose this option to have Time & Expense refer to the pay types selected on the Pay Types (UDT10) Links subtask of the Timesheet Classes screen. Options you select in the subtask, such Level 1 and Level 2 mapping options, apply just to the selected Timesheet Class, and the options can be different than the same options in the UDT10 (Pay Type) application. **Note:** When this option is selected, you must be sure to map regular pay types that count towards overtime to the overtime pay type to which the hours should be distributed. For example, if sufficient hours are entered against a regular pay type to meet the level 1 or level 2 hours threshold and a level 1 or level 2 overtime mapping charge is not selected, members of the timesheet class will receive a charge error when the timesheet is signed. See the "Pay Types Subtask Updates" section for more information.

Overtime Hours Rules Tab Updates

The Overtime Hours Rules tab (previously named OT Hours Rules) includes new options for configuring overtime for holidays, Saturdays, and Sundays. See the table below for additional details.

Due to related enhancements to pay types, the **Factor** field became obsolete, so it was removed from the existing validation sections (Weekly, Daily, and 7 Consecutive Day Rule).

Previously, for example, the **Factor** field was used to enter the overtime factor used to determine overtime pay, such as a factor of 1.5 for Level 1 or a factor of 2 for the Level 2 threshold. Now, instead of setting the factor at the Timesheet Class level, Time & Expense refers to the level associated to overtime threshold and then validates whether the pay type used is the correct level. See "Pay Types Subtask Updates" for details.

Note: When Time & Expense is co-deployed with Costpoint, the factor associated with the pay type is set in **Costpoint » People » Labor » Labor Rate Controls » Manage Pay Types**.

Updates to existing sections and descriptions of new sections on the tab are described below:

Field	Description
Updates to Existing Overtime Sections	
Weekly Overtime	Fields that have been updated in this existing section include: **Validation**: The field label changed from "Edit" to "Validation." Options on the menu were also renamed: ▪ **No Edit** was changed to **None**. ▪ **Soft Edit** was changed to **Warning**.

Field	Description
		▪ **Hard Edit** was changed to **Error**. This option is not editable if overtime is calculated and the **Overtime Distribution** field on the Basic Information tab is set to **Daily**.
	Perform Edit by	The field label was changed. It was previously named “Based On.” Rules for this field were updated such that when **Whole Week** is selected from this drop-down list, fields under **Daily Overtime** are now also editable. Previously, the fields were editable only if this option was selected as **Each Day**.
	Include Daily Overtime Hours in Calculation (Pyramid OT)	The field label was updated. It was previously named “Include Previous Day(s) Overtime Hours.”
	Payroll Week Starts	The field label was changed from “Week Starts” to “Payroll Week Starts” and the check box was moved up.
	Use	The functionality of this field was updated. If you clear this check box, the **Hours Over** field displays as N/A.
	Factor	This field was removed.
Daily Overtime	Fields that have been updated in this section include:	
	Validation	The field label changed from “Edit” to “Validation.” Options on the menu were also renamed: ▪ **No Edit** was changed to **None**. ▪ **Soft Edit** was changed to **Warning**. ▪ **Hard Edit** was changed to **Error**. This option is not editable if overtime is calculated and the **Overtime Distribution** field on the Basic Information tab is set to **Weekly**. If this option is set to **Error** or **Warning**, the **Overtime Distribution** option on the Basic Information tab defaults to **Daily**.
	Use	The functionality of this field was updated. If you clear this check box, the **Hours Over** field displays as N/A.
7 Consecutive Date Overtime	Fields that have been updated in this existing section include:	
	Validation	The field label changed from “Edit” to “Validation.” Options on the menu were also renamed:

Field	Description
	<table><tr><td></td><td>▪ **No Edit** was changed to **None**. ▪ **Soft Edit** was changed to **Warning**. ▪ **Hard Edit** was changed to **Error**. If either the **Saturday Overtime** and **Sunday Overtime** option is enabled, this option is set to **None** and disabled.</td></tr><tr><td>**Use**</td><td>The functionality of this field was updated. If you clear this check box, the **Hours Over** field displays as N/A.</td></tr></table>
New Overtime Sections There are three new overtime configuration sections: ▪ Holiday Overtime ▪ Saturday Overtime ▪ Sunday Overtime Note that **Saturday Overtime** and **Sunday Overtime** are only enabled if the **7 Consecutive Day Overtime** validation option is set to **None**. All three sections include all the same fields and are described below.	
Validation	Choose from the following validation options: <table><tr><td>**None**</td><td>This is the default setting. Leave this option selected if you do not want to enable the validation.</td></tr><tr><td>**Error**</td><td>Select this option if you want to enable the validation and also want to require that any timesheet entry that does not comply with the overtime rule is corrected before the timesheet is signed.</td></tr><tr><td>**Warning**</td><td>Select this option if you want to enable the validation and will allow timesheets to be signed without correcting errors flagged by warning messages.</td></tr></table>
Use	This check box is selected by default for Level 1. If you select **Use**, the **Level 2** check box is selected and enabled. Clear the check box if there is only one overtime rate and you therefore do not need to enter threshold hours for a level 2 rate.
Threshold	Enter the number of work hours over which the Level 1 or Level 2 rate will be applied. For example, an entry of 40 hours indicates that hours past 40 will be paid at the Level 1 or Level 2 rate, respectively. For Holiday Overtime, where holidays count towards overtime, if the holiday falls at the end of the week, such as on Thursday or Friday, then hours on those days are taken into account first.

Pay Types Subtask Updates

The Pay Types subtask was updated with new fields for mapping regular pay types that count towards overtime to specific level 1 and level 2 overtime pay types.

When overtime is calculated, Time & Expense refers to these mapping selections if **Pay Type Rules Source** on the Basic Information tab is selected as **Timesheet Class**.

> **Note:** If you decide to set **Pay Type Rules Source** to Pay Type instead of Timesheet Class, the mapping of regular pay types to specific overtime pay types is accomplished in **Configuration » Master Data » UDT10**. See "Pay Types (UDT 10) Application Updates" below for more information.

New fields on the Pay Type Links subtask are described in the table below.

Field	Desription
Overtime Type	For overtime pay types, this field displays the overtime level, either Level 1 or Level 2. This field is editable only for overtime pay types. To change the level, click ▾ and select either Level 1 or Level 2 from the drop-down list. Note that the **Configuration » Master Data » UDT10** (Pay Type) screen was also updated with the **Overtime Type** field. The value that displays when you initially select the pay type here is designated in the UDT 10. Changing the level here does not update the setting in that screen. **Conversion Note:** After you upgrade to version 8.1, existing overtime pay types are updated with the Level 1 or Level 2 based on the value that existed in the **Factor** field on the Manage Pay Types screen in Costpoint.
Level 1 Overtime Mapping	This field is only enabled for regular, non-overtime pay types Use this option to map a regular pay type that count towards overtime to a specific level 1 overtime pay type. Click 🔍 to display the available level 1 overtime pay types. Level 1 refers to the overtime rate factor, which is a factor greater than 0 but less than 2. Lookup displays only level 1 overtime pay types. **Note:** When Time & Expense is co-deployed with Costpoint, the factor associated with the pay type is set in **Costpoint » People » Labor » Labor Rate Controls » Manage Pay Types**. When overtime is automatically calculated and/or distributed, this setting determines the rate factor (level 1) that will be used for the calculation as well as the pay type to which the hours will be distributed if **Pay Type Rules Source** on the Basic Information tab is set to **Timesheet Class**. If a value exists in this field, and you then select the **Overtime** check box, the existing value is cleared from this field.

Field	Desription
Level 1 Overtime Mapping Description	This field displays the description assigned to the selected pay type.
Level 2 Overtime Mapping	This field is only enabled for non-overtime pay types. Use this option to map a regular pay type that counts towards overtime to a specific level 2 overtime pay type. Click to display the available level 2 overtime pay types. **Note:** Level 2 refers to the overtime rate factor, which is a factor greater than or equal to 2. Lookup displays only level 2 overtime pay types. When overtime is automatically calculated and/or distributed, this setting determines the rate factor (level 2) that will be used for the calculation as well as the pay type to which the hours will be distributed if **Pay Type Rules Source** under Overtime Handling is set to **Timesheet Class**. If a value exists in this field, and you then select the **Overtime** check box, the existing value is cleared from this field.
Level 2 Overtime Mapping Description	This field displays the description assigned to the selected pay type.

Pay Types (UDT 10) Application Updates

The **Configuration » Master Data » UDT10** screen was updated with new fields for mapping regular pay types that count towards overtime to specific level 1 and level 2 overtime pay type.

When overtime is calculated, Time & Expense refers to these mapping selections if **Pay Type Rules Source** on the Basic Information tab is selected as **Pay Type**.

Note: If you decide to set **Pay Type Rules Source** to Timesheet Class instead of Pay Type, the mapping of regular pay types to specific overtime pay types is accomplished in **Time » Timesheet Classes » Pay Types Links** subtask. See "Pay Types Subtask Updates" above for details.

New fields on the Pay Types (UDT10) screen are described in the table below.

Field	Desription
Overtime Type	This field only displays if **Overtime** is selected, indicating that it is an overtime pay type. Choose from the following options: ▪ **Level 1**: Choose this option to designate this as a level 1 overtime type. ▪ **Level 2**: Choose this option to designate this as a level 2 overtime type. The designation of the level is used by Time & Expense when populating the Level 1 and Level 2 Lookups in the Overtime Mappings section, which is used to map regular pay types that count toward overtime to the correct charge, when overtime is automatically distributed.

Field	Desription
Overtime Mapping Fields below are only enabled for regular, non-overtime pay types. If the **Overtime** check box is selected, these fields are disabled. Use this section to map regular pay types that count towards overtime to a specific level 1 and/or level 2 overtime pay type.	
Level 1	This field displays the description assigned to the selected pay type. Use this field to map regular pay types that count towards overtime to the appropriate level 1 overtime pay type. Click Lookup to select the pay type. Level 1 is dependent on the value of the rate 1 factor, a type which has an overtime factor of less than 2 but greater than 0. The Lookup list only displays overtime pay types that are level 1. If a value exists in this field, and you then select the **Overtime** check box, the existing value is cleared from this field. **Note:** When Time & Expense is co-deployed with Costpoint, the factor associated with the pay type is set in **Costpoint » People » Labor » Labor Rate Controls » Manage Pay Types**.
Level 2	Use this field to map regular pay types that count towards overtime to the appropriate level 2 overtime pay type. Factor is greater than or equal to 2.

UDT 01 Types Application Updates

A **Distribute Calculated Overtime** option was added to the **Configuration » General Controls » Account Types** screen. This setting enables you to control whether a UDT01 (Account Type) that counts towards overtime will also be distributed towards it.

For example, if the **Count Towards Overtime** (existing check box) is selected, the new **Distribute Calculated Overtime** check box is selected by default. When both check boxes are selected, the selected Account Type Code count towards overtime and is also distributed to it.

If you do not want the overtime hours distributed to a selected Account Type Code, clear the **Distribute Calculated Overtime** check box. For example, if you want PTO to count towards overtime for the purpose calculating hours on the timesheet, but you do not want the hours to be allocated to overtime, you would clear the check box.

Conversion Note: The **Distribute Calculated Overtime** check box is selected for Account Types Code where **Count Towards Overtime** is already selected.

Change Timesheet Status Utility Updates

The **Time » Time Utilities » Change Timesheet Status** application was updated to include the ability to automatically calculate and distribute overtime hours when timesheets are marked as Signed.

In the future, Time & Expense will be updated to calculate overtime when the timesheet is saved. Presently, however, it is calculated and distributed only after the timesheet is signed.

Therefore, when timesheets are marked as Signed in the utility, automatic overtime calculation may occur in the following circumstances:

- Based on settings in Timesheet Classes, automatic calculation and distribution of overtime is enabled for the timesheet(s) being processed, and the following conditions are also present:
  - The timesheet includes regular pay types that count towards overtime, and overtime hours are detected based on overtime rules.
  - The timesheet does not include hours manually applied to an overtime pay type. (The feature only works when all hours are applied to regular pay types that count towards overtime.)

Note: See “Timesheet Classes Configuration Updates” and related sections for details on how automatic calculation of overtime is enabled and configured.

If overtime is calculated, and if no errors prevent the status from being updated to Signed, the Charge Distribution subtask link displays on the timesheet, where the employee can review the number of hours that were calculated as overtime and the pay type(s) to which the hours were distributed.

Note: New timesheet validations for holiday, Saturday, and Sunday were added to the Overtime Hours Rules tab of the Timesheet Classes screen. The Change Timesheet Status utility was updated to reflect these changes, and you therefore may encounter other new validation errors when marking timesheets as Signed. See “Overtime Hours Rules Tab Updates” for more information.

Timesheet Updates for End-Users

Time entry was updated with the ability to calculate overtime and distribute the overtime hours to the appropriate overtime charge codes based on the regular hours you enter on the timesheet.

If your timesheet class is configured to automatically calculate overtime, a new Charge Distribution subtask displays on the **Time » Timesheets » Timesheet** screen after the timesheet is signed and if overtime was calculated.

The new subtask is also available from the **Time » Timesheets » Manage/Approve Timesheets** screen.

This enhancement also included the creation of new timesheet validations, which you may encounter when saving or signing your timesheet.

New Charge Distribution Subtask

If your timesheet is configured to automatically calculate overtime, you can enter all of your time as regular hours, and based on overtime rules and the number of hours entered, Time & Expense determines the overtime hours and redistributes those hours to the appropriate overtime pay type.

Overtime is calculated and redistributed during the signing process. After the timesheet is signed successfully, the Overtime Distribution subtask displays on your timesheet, if overtime hours were calculated.

Click the Overtime Distribution subtask to view the overtime hours that were automatically calculated by Time & Expense based on regular hours entered.

For each day/date where overtime exists, the subtask displays three separate entries:

- The total number of regular hours (for example, 10 hours).

- The overtime hours removed from the regular hours pay type, which is a negative number of hours (for example, -2).
- The overtime hours added to overtime pay type, which is a positive number of hours (for example, 2).

The above occurs for every charge code entered on the timesheet where overtime is calculated and redistributed. For example, if you worked 3 hours overtime, but those hours were entered against three separate regular charge codes on the main timesheet, the subtask will display nine lines total.

Overtime is automatically calculated and redistributed only if no overtime charges were manually entered on the timesheet. If you manually add an overtime charge and pay type to the timesheet, overtime charges must be manually entered for the entire pay period.

Field	Description
Line	The line number of the first row on the subtask corresponds directly to the row on the main timesheet where the first overtime calculation occurred. Each overtime calculation creates three rows on the subtask: one showing total regular hours worked on that day/date and two others showing the overtime distribution (negative and positive values). Although the three rows display sequentially, the line numbers of the rows showing the distribution might not be sequential to the row showing the total hours. This is because the line number of the row showing total regular hours on the subtask matches the line number of those same hours in the main timesheet table. For example, if rows 5 and 6 in the main timesheet table both have overtime calculations, then in the subtask, the line number sequence would be 5, 7, and 8 for the first calculation, and 6, 9, 10 for the second one.
Description	This field displays the charge description.
Pay Type	This field displays the pay type, for example, R for regular or O for overtime.
Day/Date	The Day/Date column displays the overtime hours that were calculated for a given day/date on the timesheet. Three rows display for each overtime calculation. The first one displays the total number of regular hours entered for that day/date on the main timesheet. The next two rows show the overtime, one row displaying negative hours and the other positive hours. The negative entry removes the hours from the regular pay type, and the positive entry redistributes the hours to the overtime pay type.

Field	Description
	Note: The Regular and Overtime rows at the bottom of the main timesheet are also updated to reflect the amount of overtime calculated per day/date. For example, if you originally entered 10 regular hours, and 2 hours were calculated as overtime after signing, the summary rows at the bottom of the main timesheet will display the following updated totals: ▪ Regular: 8 ▪ Overtime: 2 ▪ Total: 10 However, your original regular hours entry (10 in this example) on the timesheet is unchanged, and pay type details for the overtime hours only display on the Charge Distribution subtask.

New Overtime Timesheet Validations

As part of the new feature for automatically calculating and distributing overtime, new overtime validations for holiday, Saturday, and Sunday were added. As with other existing timesheet validations, you may encounter warning or error messages if an entry you make is not valid according to rules set by your System Administrator.

Hey Deltek! for Time Entry

Voice interaction (Hey Deltek!) for the Timesheet application can be accessed from either the desktop or a mobile device (using Costpoint Mobile/PWA), enabling you to enter information or implement actions through verbal commands instead of entering them using a keyboard.

Hey Deltek! is also interactive and will request missing information, such as prompting you for a missing project charge code, day/date details, or required/optional revision explanations.

Note: Current limitations of Hey Deltek! include:

- It is not yet available in Costpoint Mobile Time & Expense (the native app).
- The microphone icon displays on many applications throughout Time & Expense, but voice interaction is presently limited to the Timesheet application.

Attention System Administrators: See the "Hey Deltek! Voice Interaction Settings" section in this document for additional information.

The following timesheet tasks are currently available using Hey Deltek!:

- Navigate to different days/dates.
- Add, edit, and delete hours.
- Enter revision explanations.
- Save the timesheet.
- Sign the timesheet.

Note: See the "Hey Deltek! Timesheet Functionality and Voice Commands" section below for more information on available functions and example voice commands.

The following timesheet tasks are *not* currently available but are planned for future versions:

- Create new timesheet.
- Add a new line.
- Add charge or start your time on a charge.
- Add hours to projects with different pay type.
- Move or change hours from one charge to another.

Enabling Voice Interaction on Your Device

Unless disabled by your System Administrator, Hey Deltek! is enabled for all users by default. You do, however, have to enable your device for first-time use.

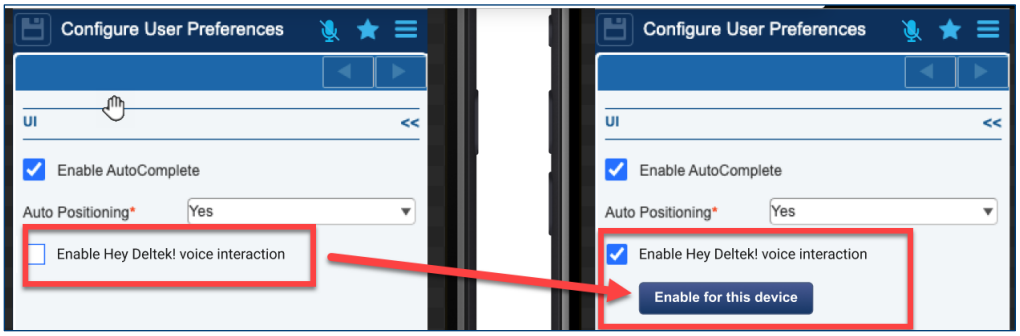
Note: Voice interaction is available for use on:

- Mobile devices with Android or iOS operating systems and Google Chrome or Safari browsers.
- Desktops using Google Chrome.

To give Costpoint access to the microphone, choose from one of the following options:

- Click on the Global Toolbar.
- Click **Voice** on the Options menu.
- Select the **Enable Hey Deltek! Voice Interaction** check box in Configure User Preferences.

Note: If you choose to block Deltek from accessing your microphone, Time & Expense cannot prompt you again to enable the microphone in the future. You must then do it through your browser settings in Configure User Preferences.



Note: Enabling the microphone is a step that only needs to be completed once.

Hey Deltek! Modes of Operation

The following table describes the microphone's three states of operation:

Microphone Status	Description
Disabled	Voice Interaction has not yet been enabled for Costpoint on your device.
Passive Listening Mode	This mode displays after voice interaction is enabled on your device but is not currently active.
Active Listening Mode	After you take one of the following actions: ▪ Say "Hey Deltek" or ▪ Click/tap . Costpoint transitions to **Active Listening Mode**, where it remains ready to interpret and fulfill your verbalized commands.

Hey Deltek! Timesheet Functionality and Voice Commands

The following table highlights timesheet actions currently eligible for voice command, along with examples of possible voice commands.

Function/Action	Vocal Command Options	Additional Examples/Notes
Initiate Voice Interaction	"Hey Deltek!"	**Optional:** Click on the toolbar to initiate Active Listening mode .
Open the **Time » Timesheets » Timesheet** application from the main menu after login	"Hey Deltek, Open Timesheet."	
Open the timesheet to a specified date	"Open the timesheet for (date)."	"Open the timesheet for November 14."
Add hours	▪ "Add (#) hours for (charge) on (day/date)." ▪ "Add (#) hours on (day/date) for (charge)."	▪ "Add three hours for Administration Labor on June 6." ▪ "Add three hours on June 6 for Administration Labor."

		Note: Depending on how you phrase the request, Hey Deltek! may prompt for charge or day/date details.
Change hours	▪ "Change (charge) to (#) hours on (day/date)." ▪ "Change (charge) on (day/date) to (#) hours."	▪ "Change Administration Labor to three hours on June 6." ▪ "Change Administration on June 6 to three hours." **Note:** Depending on how you phrase the request, Hey Deltek! may prompt you for charge or day/date details.
Delete hours	▪ "Delete (#) hours for (charge) on (day/date)." ▪ "Delete (#) hours on (day/date) for (charge)."	▪ "Delete three hours for Administration Labor on June 6." ▪ "Delete three hours on June 6 for Administration Labor." **Note:** Depending on how you phrase the request, Hey Deltek! may prompt for charge or day/date details.
Open previous timesheet.	"Open the previous timesheet."	
Save the timesheet	▪ "Save." ▪ "Save timesheet."	
Enter Revision Explanation	(In most scenarios, Deltek prompts you for a revision explanation by telling you that it is either required or optional.)	"Set Revision Explanation to be 'Powershot XL Admin." **Note:** All words following "Set Revision Explanation to be…" are recorded in the **Revision Explanation** field.
Check Leave	"How much leave do I have?"	
Sign the timesheet	▪ "Sign." ▪ "Sign timesheet."	When you request this function, Hey Deltek! prompts you to affirm that the information you have entered is accurate.

Stop Voice Interaction operation	“Stop.”	**Optional:** Click .
Exit Costpoint	“Goodbye.”	

Offline Timesheet Entry

The Offline Time Entry feature enables you to record timesheet charges while your mobile device or desktop is disconnected from the Internet. When you return to online status, you can synchronize your offline timesheet charges to the Costpoint Time & Expense database.

To make the Offline Time Entry functionality available for your use, your system administrator must first enable the **Time » Timesheets » Timesheet** application for offline use.

Other applications in the Time module that may be enabled for offline use currently include **Timesheets » Work Schedule/Leave.**

Attention System Administrators: Offline capabilities are available in Costpoint and Time and Expense on laptops and mobile devices when accessed through the browser/PWA. See the “Offline Time Entry” release notes in this document for details on enabling offline timesheet functionality in **Admin » System Administration » System Administration Controls » Configure System Settings**.

The native Costpoint Mobile Time and Expense application also supports Offline mode but differs in its capabilities. See “Offline Time Entry (8.1+)” for details.

Make Timesheets Available for Offline Use

Before you can access timesheets offline, you must first make them available for offline use. This action is performed from **Time » Timesheets » Timesheet** in either in the web version or in Costpoint Mobile, while you are connected to the Internet.

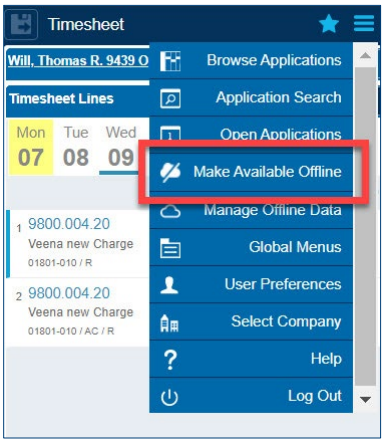
Make Timesheets Available Offline from the Desktop

From your Desktop in the web version of Time & Expense, you have two options for making timesheets available for offline use. Choose one of the following:

- On the Application Toolbar, click .
- From the Options menu, click **Make Available Offline**.

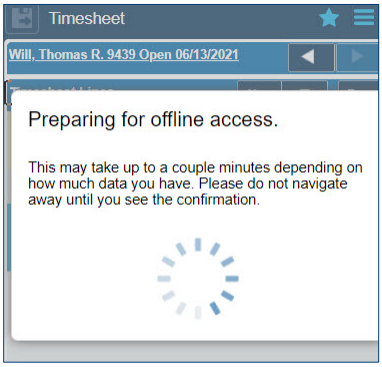
Make Timesheets Available Offline in Costpoint Mobile

To make timesheets available for offline use in Costpoint Mobile, click/tap and select **Make Available Offline** to download your timesheet data.



Prepare for Offline Access

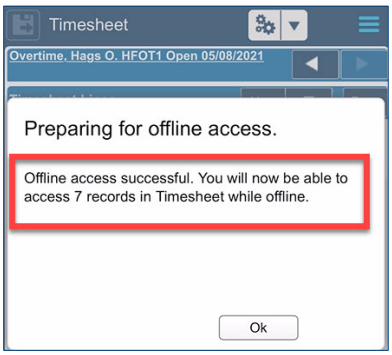
After you have selected **Make Available Offline** in either version, Costpoint prepares up to ten of the top eligible timesheet records for offline availability. During that time, the following process indicator displays:



Be advised that, depending on the number of records subject to preparation for offline use, this process can take several minutes.

> **Note:** To ensure security of your Timesheet data, before Costpoint prepares your timesheets for offline use, you might be required to confirm your identity by submitting your credentials through either Face ID or a security code as specified by the System Administrator.

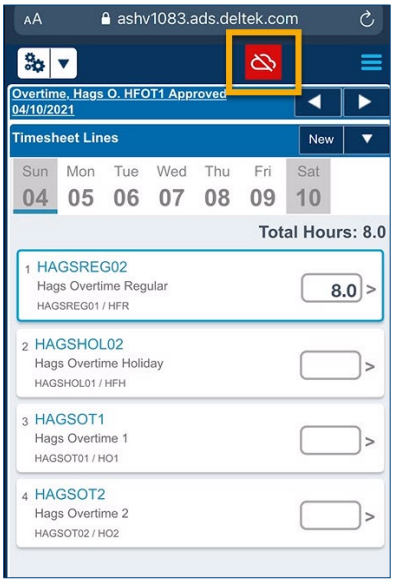
At the successful conclusion of the process, a confirmation message notes the number of records available for offline access:



Using Time & Expense in Offline Mode

When you open your web browser while disconnected from the Internet, the browser detects your offline status, and when you access the Costpoint login screen, a red banner displays the Offline Status icon:

The Offline Status icon displays while you are offline, including on the Timesheet screen. The following example is from Costpoint PWA:



While offline, in addition to recording hours, you can add one additional timesheet for the next period, complete with auto-fill for valid charges. If you add new charges to the timesheet, they are validated the next time you connect online.

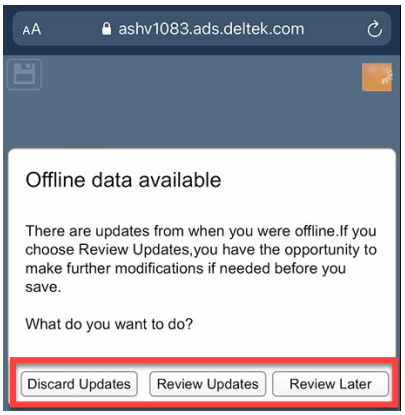
Note: Two Timesheet buttons and their associated functions, commonly used in Costpoint PWA and Desktop versions of Time & Expense, are not available in Offline mode:

- **Add to Favorites**: Favorite charges can only be added in online mode.
- **Save**: Instead of saving your records, you need only log out of Costpoint while offline and then log in again in regular online mode.

Updating Timesheet Records with Offline Data

The next time you log in to Costpoint while connected to the Internet, you must use the same device you used in Offline mode in order to capture the offline data.

After you log on, Costpoint will prompt you to review your offline updates:

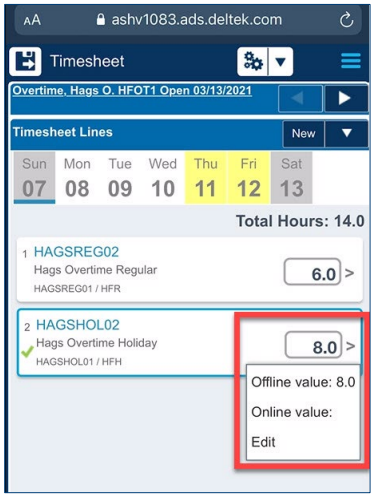


To review your offline Timesheet updates:

1. Log in to Costpoint.
2. Open the Timesheet screen.
3. In the Offline Data Available window, choose from the following options:

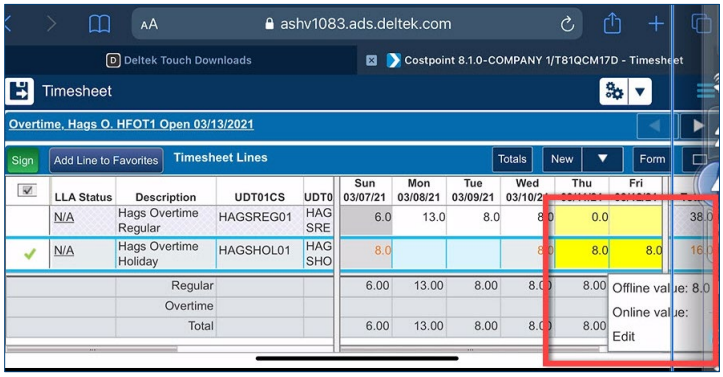
Button	Description
Discard Updates	Click/tap this button to delete existing offline timesheet data and open the application.
Review Updates	Click/tap this button to display existing timesheet offline data for review. You can change or undo these updates before you merge data into the database.
Review Later	Click/tap this button to preserve your offline data for review at a later time. Time & Expense will prompt you to review or discard updates the next time you open the application.

When you select **Review Updates**, Time & Expense highlights days for which offline data was entered. Select a cell to view additional information for that entry.



For Timesheet Lines cells containing an offline entry, the drop-down list displays the following information:

- **Offline Value**: This is the number of hours you entered while offline for this day and charge.
- **Online Value**: If this field has no entry, the Offline Value has not yet been accepted.
- **Edit**: Click/tap this option to modify the totals you entered in the Timesheet cells while offline. The Timesheet Lines table displays, where you can input your adjusted totals as shown in the following image:



Additional Options for Managing Offline Data

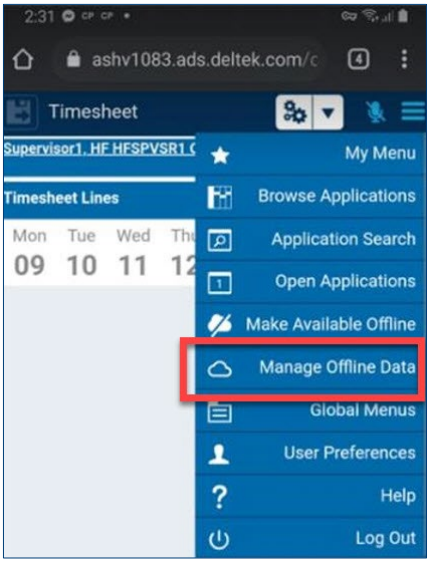
While the process for preparing timesheet data for offline use automatically renders the ten most current records available, the Manage Offline Data screen provides the following capabilities for users with more specific requirements for their offline access:

- Select specific records for offline use.
- Review the data records currently retained on your device.
- Clear specific records, or all of them, currently retained on the device to allow space for new data needed for future offline work.

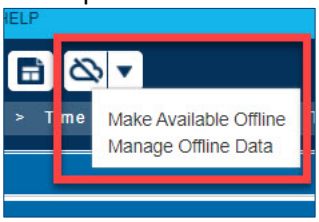
To review your offline data:

1. Click **Manage Offline Data** from the menu.

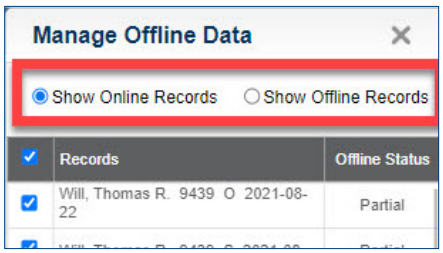
PWA:



Desktop:

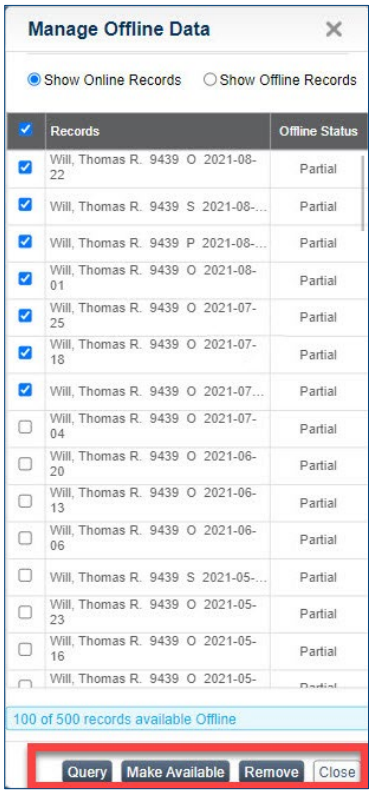


2. To narrow the scope of the data displayed for easier viewing, select from these two display options:
   - Show Online Records
   - Show Offline Records



The Offline Status column displays the current status for that record, either **Partial** or **Full**.

- **Partial**: The record includes only data cached at the time you previously viewed it, including any subtask data you accessed.
- **Full**: The record includes all related data including subtask data, regardless of whether you accessed it.



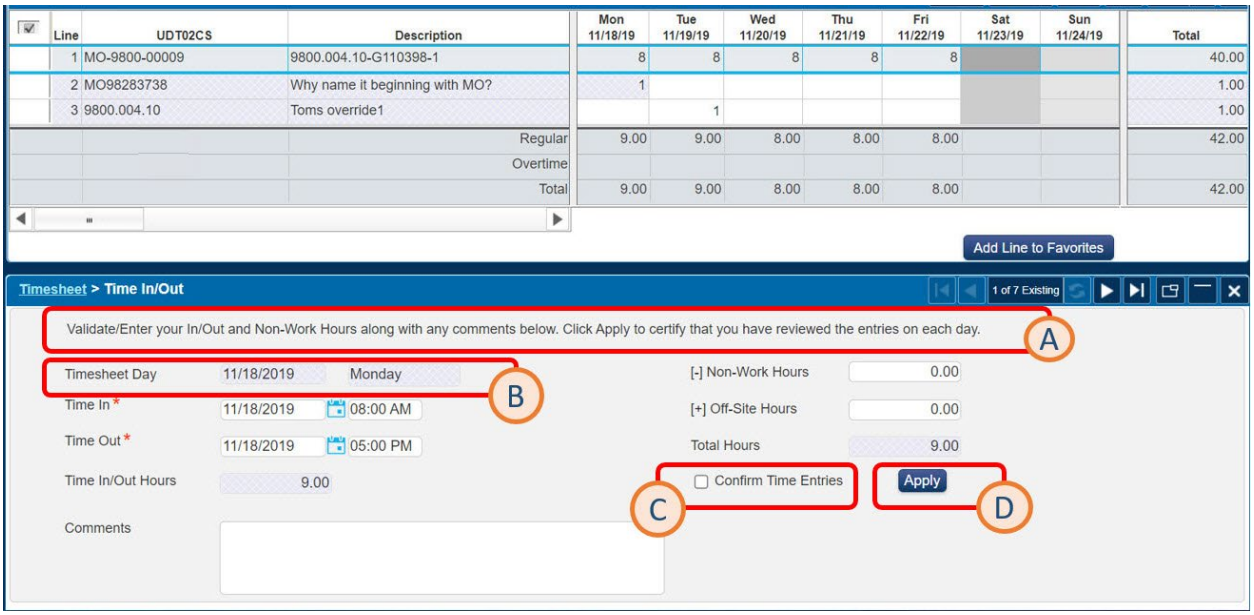
After you choose to display online or offline records, you can select from the following button options:

Button	Description
Query	Click/tap this button to search for data not visible on the current screen.
Make Available	Click/tap this button to make the selected records available for offline use.
Remove	Click/tap this button to remove the selected records from your device's data storage.

Note: You can store up to 500 records on your device. As the database nears its capacity, Time & Expense prioritizes Full records over Partial ones.

Time In/Out Subtask Interface Updates

The **Time » Timesheets » Timesheet » Time In/Out** subtask, used by employees who are required to enter shift start/stop times, was updated with new options. The screen image and corresponding table below identify and describe new fields and buttons:



Area	Change	Description
A	**New Onscreen Instruction**	On-screen instructions were updated to the following text: “Validate/Enter your In/Out and Non-Work Hours along with any comments below. Click **Apply** to certify that you have reviewed the entries on each day.”
B	**Timesheet Day**	Two new fields, paired under the label **Timesheet Day**, were added. These fields display the date and day of week for the cell date currently selected in the Timesheet Lines table.
C	**Confirm Time Entries**	This check box was renamed from **Review/Saved**. Previously, this check box displayed by default. It now displays based on system configuration. If the check box does display, you must select it before you click **Apply**, or an error message will result. System Administrators: see the note below.
D	**Apply**	Click this new button to save your current data and continue working. **Note:** When **Require Confirmation** is selected, users will receive an error message if they click **Apply** without confirming their hours by selecting the **Confirm Time Entries** check box.

Attention System Administrators: The Basic Information tab of the **Time » Time Controls » Timesheet Classes** screen now includes a **Require Confirmation** check box, which is enabled if **Entry Mode** is selected as **Attendance Required** or **Attendance Optional** (Time In/Out).

When you select **Require Confirmation** in Timesheet Classes, the Time In/Out subtask displays the **Confirm Time Entries** check box, which employees are required to select before they click **Apply**.

Mass Approve Timesheets Configurable by Functional Role

A new **Mass Approve** setting was added to the Timesheet Rights tab of the **Configuration » Resources » Functional Roles** screen. Select this check box to enable the Functional Role to bulk approve or reject employee timesheets on the Manage/Approve Timesheets screen.

The check box is enabled only if the **Approve** check box above is also selected.

Note: The **Mass Approve** check box is dimmed unless **Enable Mass Approvals** is also selected on the Miscellaneous tab of the **Time » Time Controls » Time Settings** screen.

The **Time » Timesheet » Manage/Approve Timesheet** screen was updated to allow or prevent the ability of users to bulk approve or reject timesheets based on the permissions granted to their functional role.

To enable the functionality associated with this new check box:

1. On the **Time » Time Controls » Time Settings** screen, ensure that **Enable Mass Approvals** is selected.
2. On the Timesheet Rights tab of **Configuration » Resources » Functional Roles**, ensure that **Approve** is selected.
3. Select **Mass Approve**.

Batch Expense Enhancement

To help automate the batch entry process and save Administrators manual effort, **Expense » Batch Expenses » Batch Expenses** now performs mass updates of the **Ghost Card** and **Employee** fields.

Note: This enhancement applies to imported Visa and MasterCard transactions only.

After you designate a transaction as belonging to either a ghost card or to an employee, all other records which have that account number are automatically updated with the same designation. For example:

- If you select **Ghost Card** on one transaction, **Ghost Card** is automatically selected on the remaining records.
- If you select a value from **Employee**, that value automatically populates the **Employee** field on the remaining records.

Note: The **Employee** field auto-populates other rows only when **Ghost Card** is not selected. If **Ghost Card** is selected on a row and you then select a value from **Employee**, that value applies to that row only, since ghost cards are often associated with several different employees.

After you identify an account number as a ghost card, the individual transactions belonging to the card must still be assigned to specific employees prior to posting. Therefore, before proceeding with either selection, you may want to consider the following:

- If all the transactions belong to one employee, consider choosing the employee before selecting **Ghost Card** so that both fields auto-populate on all rows, saving you further effort before posting.
- If the transactions belong to multiple employees, do not choose the employee before selecting **Ghost Card** or that one employee will auto-populate the **Employee** field on all rows, requiring you to correct the entries before posting.

After transactions are posted, the following system actions also occur:

- The batch type in **Expense » Batch Expenses » Expense Batch Types** is updated with the ghost card account number.

  If a ghost card was pre-existing and you cleared the **Ghost Card** check box in **Expense » Batch Expenses » Batch Expenses**, then the ghost card is removed from the batch type.
- The Pay Method subtask of **Configuration » Resource » Resource Information** for the selected employee is updated with the credit card account number so that future imports will be automatically associated with the employee without manual interaction.

Note: The card numbers are added to the above applications in the tokenized format.

Enhanced Capture of Credit Card Receipt Information

The **Expense Reports » My Outstanding Expenses** application was updated with additional expense fields related to lodging, meals, and entertainment.

Note: Capture Receipt in Costpoint Mobile Time & Expense was updated to capture these same fields.

The field values populate by default in My Outstanding Expenses after you upload the receipt (if ICR is enabled) or after you select an imported expense. These new fields include:

- **Tip**: This field is editable and displays only if the Wizard Type is Meals or Entertainment.
- **Merchant**: This field displays the merchant details available from the uploaded receipt.
- **Lodging subtask**: This new subtask includes the following fields:

Field	Description
Date	This field is editable. If more than expense exists with the same date, you are required to combine them.
Daily Room Rate	This field is editable and displays the room rate.
Daily Tax Rate	This field is editable and displays the tax rate.

The new fields were also added to **Expense Reports » Expense Report** and auto-complete if you select the expense from Outstanding Expenses.

Level 3 Credit Card Fields Added to Backend Tables

As part of an ongoing effort to increase the amount of expense data collected, as well as more fully automate expense entry, numerous Level 3 data fields for Amex, Mastercard, Visa, and Receipt Capture were added to the backend tables of:

- **Batch Expenses » Batch Expenses**
- **Expense Reports » My Outstanding Expenses**

Note: Level 3 data is transactional data that is not attached to Level 1 financial records, such as all the additional information on an airline ticket or hotel receipt.

The Level 3 fields will be gradually added to the application interfaces and to the expense report form in future releases.

For this current release, the only Level 3 fields that display are those contained within the Lodging subtask of My Outstanding Expenses, as described in the section above.

New Level 3 fields that exist only in the backend tables are not accessbile through frontend queries or reporting, but any imported or captured field values can be accessed using database administration tools, including backend queries. Contact your Database Administrator for assistance.

Merchant Details Added to Expense Report

A **Merchant** field was added to the Expense Details area of **Expense Reports » Expense Report** and **Expense Reports » Manage/Approve Expense Reports**. It displays for all expense types.

When you select an outstanding expense that includes merchant details, the field auto-populates but the merchant information is not editable. The field is editable for manually added expenses.

The merchant details also display in reports run from the following Expense Reports applications:

- Expense Report
- Manage/Approve Expense Reports
- Print Expense Report

Costpoint Functional Roles

Note: The changes described in this section apply only to Time & Expense systems that are co-deployed (share everything) with Costpoint. Stand-alone versions of Time & Expense are unaffected.

Maintenance of functional role codes and descriptions has been shifted out of Time & Expense and are now maintained from the new Manage Functional Roles (SYMROLE) screen in Costpoint. Use this screen to define functional roles and specify if these roles should be available for use in Time & Expense. See "Managing Functional and Project Roles" for more information.

Note that only the role code and descriptions are managed from Costpoint. The actual permissions are still managed from **Time & Expense » Configuration » Resources » Functional Roles**.

Note: The **Time & Expense » Configuration » Utilities » Toolkit** application also includes an option that transfers existing Time & Expense Functional Roles (UDT02_SPVSRs) to Costpoint. To learn more about this post-upgrade requirement, see "Toolkit for Post-Upgrade Migration of T&E Data to Costpoint."

Application Changes to Functional Roles

Because maintenance of functional roles is now performed in Costpoint, the **New**, **Copy**, and **Delete** buttons are hidden in **Configuration » Resources » Functional Roles.**

Field Length Modified in Multiple Applications

The length of the **Functional Role Code** and **Description** fields within numerous Time & Expense screens was increased to the maximum limit to accommodate longer values coming from Costpoint.

Applications updated with this change are described in the following table.

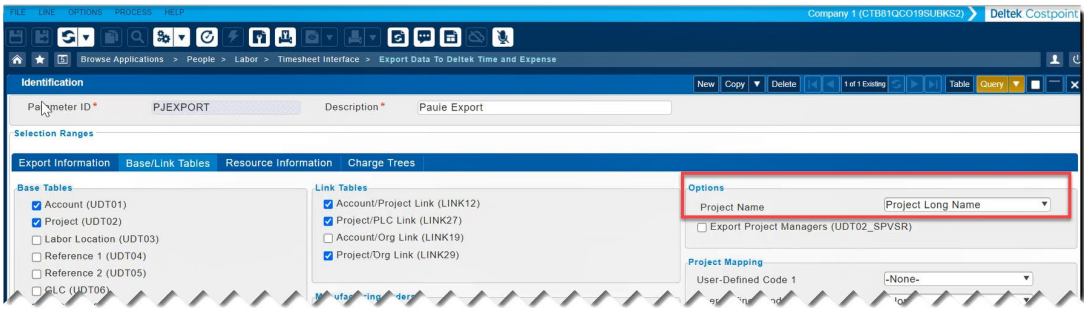
Area	Application Updated
Time » Timesheets	▪ Work Schedule/Leave ▪ Resource Schedules/Leave ▪ Manage/Approve Timesheets ▪ Approve Timesheet Charges ▪ Timesheet Correction Status
Time »Timesheet Reports/Inquiries	▪ Daily Floor Check ▪ Timesheet Status ▪ Resource Activity ▪ Charge Activity ▪ Interim Timesheets
Time » Time Controls	▪ Workflow Events
Time »Time Utilities	▪ Mass Correct Timesheets
Expense » Expense Authorizations	▪ Expense Authorization ▪ Manage/Approve Expense Authorization ▪ Print Expense Authorization
Expense » Expense Reports	▪ Print Expense Report ▪ Expense Report ▪ Manage/Approve Expense Report
Expense » Expense Reports/ Inquiries	▪ Commitments Inquiry ▪ Attachment Download

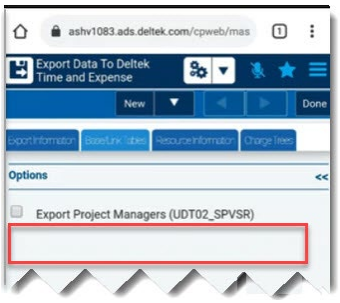
Area	Application Updated
	▪ Expense Authorization Status ▪ Print Commitments ▪ Outstanding Aging
Expense » Expense Interfaces	▪ Export ERs / Advances
Expense » Expense Controls	▪ Expense Types ▪ Expense Report Types
Expense » Expense Utilities	▪ Change Expense Report/ Advance Status ▪ Expense Report Convert Attachment
Configuration» Resources	▪ Resource Information ▪ Resource Groups ▪ Functional Roles ▪ Profile ▪ My Desktop ▪ Resource Licenses
Configuration» Master Data	▪ UDT01 ▪ UDT02
Configuration » Interfaces	▪ Master Data Import History

Project Long Name

The maximum capacity for the **Charge Branch Description** field, which is often the charge name itself, has been increased from 60 to 120 characters. This doubled capacity resolves errors that occurred when users used Charge Lookup for timesheets, expense authorizations, and expense reports with charge tree branches that contained 120 characters.

Support for longer charge names is enabled when the **Project Long Name** option is selected from the **Project Name** drop-down list on the **People » Labor » Timesheet Interface » Export Data to Deltek Time and Expense » Base/Link Tables** tab.





The **Project Name** drop-down list does *not* display when viewed in Portrait Mode in Costpoint PWA:

For additional information on configuring the long name to display in Time & Expense, see the "Project Long Name" field description in the "New Integrations Settings Tab" section above.

Note: The Project Long Name cannot be used when integrating with the following versions of Time & Expense: 9.x, 10.x, or 8.0.

Push Notifications

Costpoint now features Push Notification functionality that provides users with alerts via their laptops and Android devices. To receive these alerts, you must grant permission as described in the following section.

Notification Message Prompt

When you log in to Costpoint on a supported browser (Chrome, Edge, or Firefox) or device (Apple devices currently not supported), based on system configuration, you may receive a message prompting you to allow notifications.

When prompted, choose from the following options:

- **Turn On Notifications**
- **Remind Me Later**
- **No Thanks**

If you choose **No Thanks**, you are not prompted again unless you clear site cookies or select **Reset** on the Costpoint login page. If you select **Remind Me Later**, Costpoint prompts you again after two weeks.

After you subscribe to device notifications, you may also be prompted to subscribe to Costpoint notifications. If you subscribe, you receive alerts on that device via its native notification method. For example, on a laptop, the alerts display in the Windows notification pane.

To receive notifications on multiple devices, you must register and subscribe on each device. You can modify your notification settings at any time in user preferences.

As long as you are logged into Windows and the browser is active, notifications are received and you can respond to them even if you are not logged into Costpoint.

Currently, Push Notifications may be received from any of the following Time & Expense applications:

Area	Application Updated
Time » Timesheets	▪ Timesheet ▪ Resource Schedule/Leave

Area	Application Updated
	▪ Manage/Approve Timesheet ▪ Approve Timesheet Charges ▪ Timesheet Correction Status
Time »Timesheet Reports/Inquiries	▪ Daily Floor Check ▪ Timesheet Status
Expense » Expense Reports	▪ Expense Report
Expense » Expense Reports/ Inquiries	▪ Expense Authorization Status ▪ Expense Report Status ▪ Outstanding Aging
Expense » Expense Interfaces	▪ Batch Expenses

SMS Message Notifications

SMS functionality was also added to Costpoint. When this option is enabled by your System Administrator, you can choose **SMS Message** in the **Preferred Notification Method** field of the Configure User Preferences screen, if you want to use this notification method. You will need to add your mobile phone number and mobile provider information.

Note for System Administrators: For more information on configuring system notifications, see the following:

- "Push Notifications"
- "SMS Message Notifications"

Configuration Setting Updates for Native Costpoint Mobile T&E

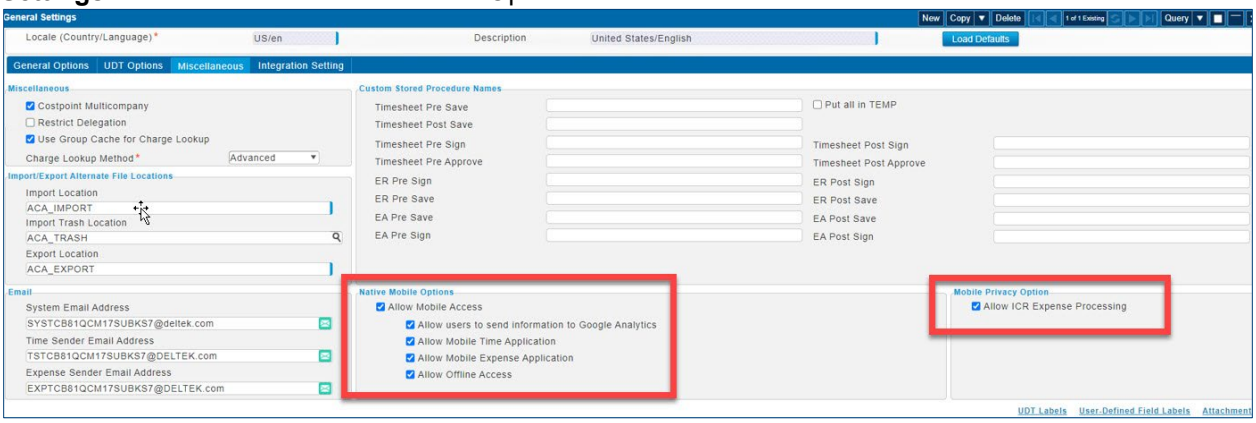
Several Time & Expense applications were updated with new configuration settings and other interface changes related to the native Costpoint Mobile T&E app. Updated screens include:

- **Configuration » General Controls » General Settings**
- **Time » Time Controls » Timesheet Classes**
- **Expense » Expense Controls » Expense Classes**

Allow Offline Access and Other Interface Updates in General Settings

Native Mobile App Settings Reorganized

The “Mobile Options” section on the Miscellaneous tab of **Configuration » General Controls » General Settings** was renamed to “Native Mobile Options.”



The **Native Mobile Options** section was updated as follows:

- The **Allow Users to send information to Google Analytics** setting was moved to this section. It was previously located under **Mobile Privacy Options**.

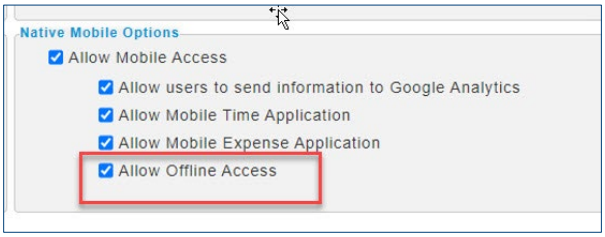
  > **Note:** As noted below under “Part Security (ITAR) Restrictions for GovCon Cloud,” this setting might be hidden for GovCon Cloud Moderate customers, which is also true of the **Allow ICR Expense Processing** option under **Mobile Privacy Options**.

- The **Enable New Mobile Responsive Design** setting was removed because the device display aspects that were controlled by the setting are now enabled by default. Note also that this setting was technically related to Costpoint PWA, not the native Mobile Time & Expense application.
- A new **Allow Offline Access** setting was added. See the following description.

Allow Offline Access

An **Allow Offline Access** was added to the Native Mobile Options section on the Miscellaneous tab of **Configuration » General Controls » General Settings**.

> **Note:** Please be aware that enabling the downloading of any data offline may not be permitted under applicable rules and regulations. You should check with your organization’s legal advisors beforehand.



Select this option to allow users of the Costpoint Mobile Time & Expense native app to record timesheet charges even if the mobile device is not connected to the Internet.

When **Allow Offline Access** is selected, the **Prepare for Offline Time Entry** option displays on the Costpoint T&E application menu, which allows users to download timesheets before going offline.

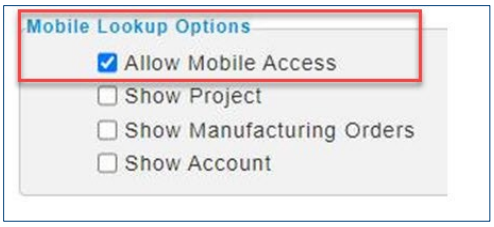
After entering timesheets in Offline mode, users are prompted to synchronize timesheet charges with the Costpoint Time & Expense database the next time the application is connected to the Internet.

This setting only controls enabling of offline access for the native Mobile Time & Expense application. See "Offline Time Entry (8.1+)" for additional information.

Offline access is also available for the standard version of Time & Expense, where Costpoint is accessed from a web browser. Offline functionality for the web version of Costpoint Time & Expense is configured from **Administration » System Administration » System Administration Controls » Configure System Settings**. See "Offline Mode" for more information.

Control Access to Costpoint Mobile T & E by Timesheet or Expense Class

The **Mobile Lookup Options** section of **Time » Time Controls » Timesheet Classes** and **Expense » Expense Controls » Expense Classes** includes a new **Allow Mobile Access** check box.



Use this setting to control access to the Mobile Time and Mobile Expense applications by class.

The **Allow Mobile Access** check box in Timesheet Classes or Expense Classes is enabled and selected by default if settings under **Native Mobile Options** on the Miscellaneous tab of **Configuration » General Controls » General Settings** are configured to first allow access to Costpoint Mobile T & E at the global level, and second, to allow access to Mobile Time and/or Mobile Expense.

Clear the **Allow Mobile Access** check box in Timesheet Classes or Expense Classes if you want to leave Costpoint Mobile T&E enabled at the global level, but you want to deny access to a subset of users who belong to the same timesheet or expense class.

For example, to prevent subcontractors from accessing Costpoint Mobile Expense, select the expense class to which the subcontractors belong, and then clear the **Allow Mobile Access** check box.

Note: Changing the state of the check box on the Timesheet Classes or Expense Classes screen does not affect global configuration in General Settings.

Part Security (ITAR) Restrictions for GovCon Cloud

If you are a Costpoint GovCon Cloud Moderate customer and part security (ITAR) restrictions are enforced for your company, certain settings on the Miscellaneous tab of **General Controls » General Settings** no longer display.

To prevent the non-ITAR processing of data, the following two options are not available:

- **Allow ICR Expense Processing**: Users who capture receipts in Mobile Expense or upload receipts in the My Outstanding Expenses application will not have the image processed via ICR processing. (Note that this change was also applied earlier in version 8.0.3.)

- **Allow Users to send information to Google Analytics**: Users of the native mobile application will not be prompted to send information to Google Analytics.

Mobile Time and Expense Updates

The following topics include enhancements made to the Costpoint Mobile Time and Expense application.

Note: The official name of the application is Costpoint Mobile Time and Expense. This document only uses it at first mention. The succeeding instances of the application name display Costpoint Mobile T&E.

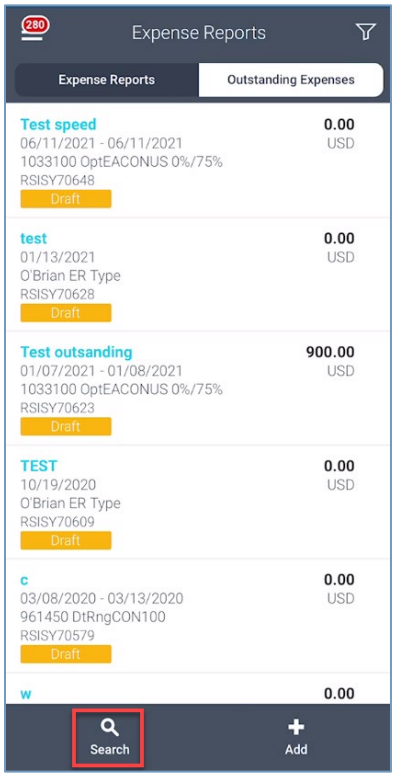
Note: The version number appended to each feature title is explained as follows:

- **Pre 8.1**: The feature is available to users of Costpoint 7.1.x, 8.0.x, and 8.1.x.
- **8.0**: The feature is available to users of Costpoint 8.0.x and 8.1.x.
- **8.1+**: The feature is available to users of Costpoint 8.1 and higher.

Expense Reports Search Feature (Pre 8.1)

As a resource manager, you can now view all expense reports of your group, regardless of the status, using the expense report search feature.

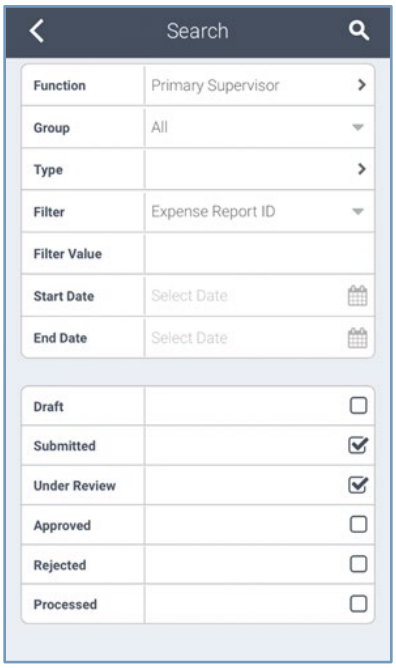
On the Expense Reports screen, the search icon displays if you have rights to view or approve other resources' expense reports (Manage Approve Expense).



Search on the Expense Report Screen

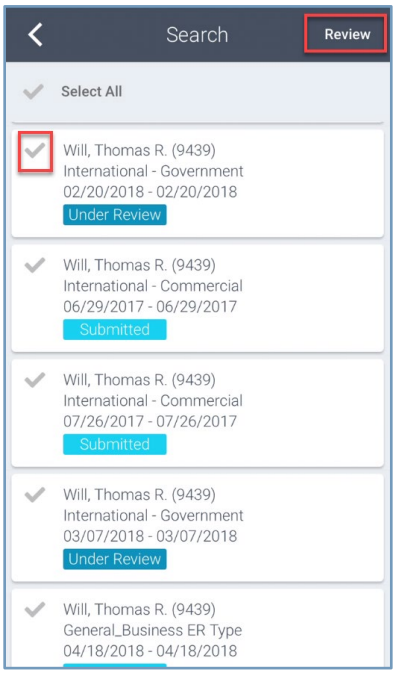
Tapping displays the Search screen, where you can specify the following criteria:

- Function
- Group
- Type
- Filter
- Filter Value
- Start Date
- End Date
- Expense Report Status



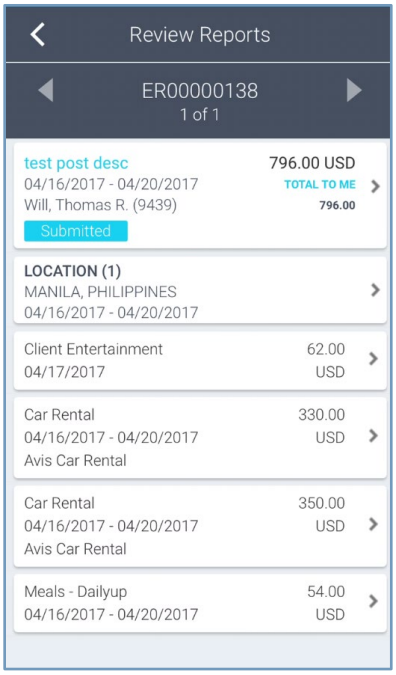
Search Screen

The application displays the expense reports that match the criteria you specify. Tap the check mark next to the expense report you want to view, and then tap **Review**. You can tap one or more expense reports. If you want to select all expense reports in the list, tap **Select All**.



Search Screen

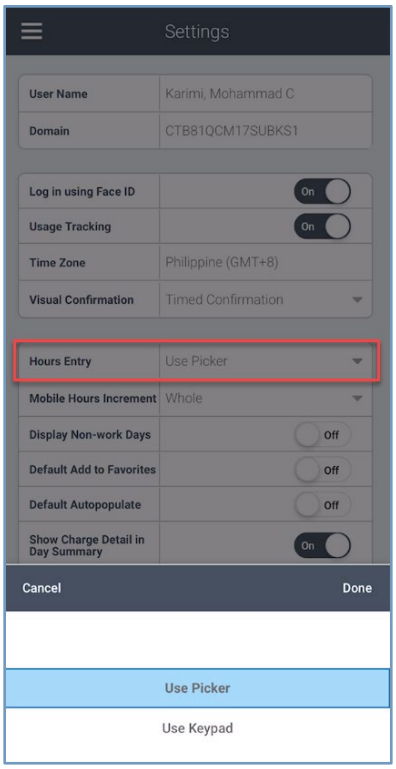
The Review Reports screen displays the expense report you selected. If you select multiple expense reports, use the back and forward buttons on the Review screen to navigate between the expense reports. Tap the appropriate section of the expense report to view its details. Tap the appropriate section of the expense report to view its details.



Review Reports Screen

Using the Onscreen Keypad for Timesheet Entries (Pre 8.1)

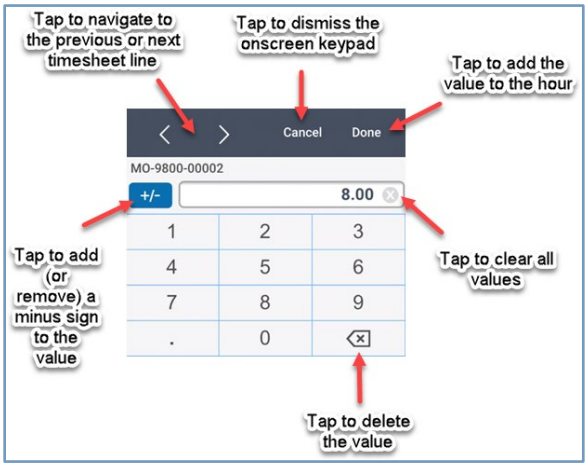
Aside from the time picker, Costpoint Mobile T&E provides another method for entering hours to your timesheet entries using the onscreen keypad. To set which number entry method to use on your mobile device, tap the **Hours Entry** field on the Settings screen.



Settings Screen

The onscreen keypad is also displayed when you tap the hour field of a timesheet line on the Timesheet screen or on the Add Charge or Edit Charge screen.

This diagram explains how to use the onscreen keypad.



Onscreen Keypad

Time and Expense Entries for Subcontractors (8.1+)

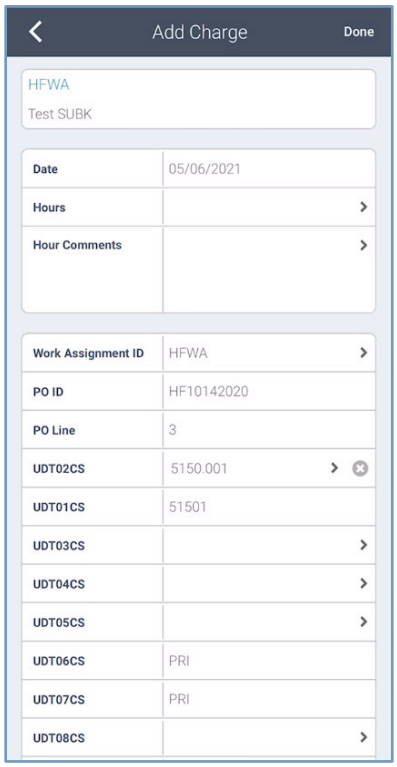
If you are a subcontractor, you now have the ability to use work assignment charges when entering timesheet and expense entries using the Costpoint Mobile T&E application. In order to utilize this feature, you must meet the following requirements:

- You must have access to the Mobile Time application or the Mobile Expense application.
- Your timesheet class or expense class must indicate that it is for subcontractors.
- Your resource type must be set to subcontractor and with access to the Time or Expense module.

Once access is granted, you can use the Costpoint Mobile T&E application and perform different time and expense tasks like a company employee, with the appropriate screens modified to display the fields required for subcontractor time and expense entries. Some of these screens are described below.

- When adding or editing a timesheet charge, the Add Charge or Edit Charge screen displays the following fields.

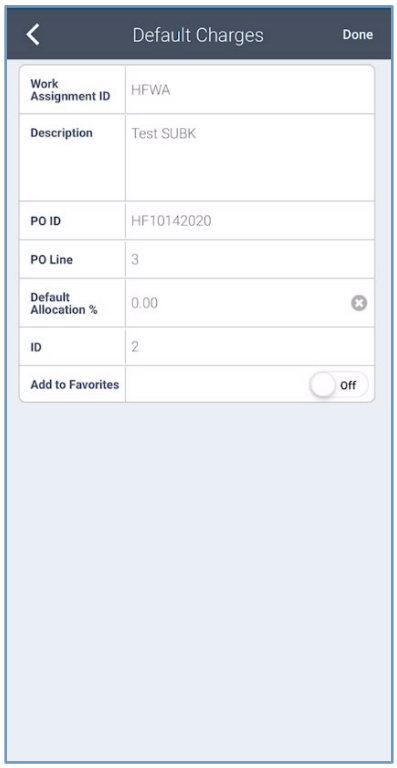
Field	Description
Work Assignment ID	This field displays the work assignment ID associated with the timesheet.
Description	This field displays the work assignment description.
PO ID	This field displays the PO ID associated with the timesheet.
PO Line	This field displays the line number on the order.



Add Charge Screen

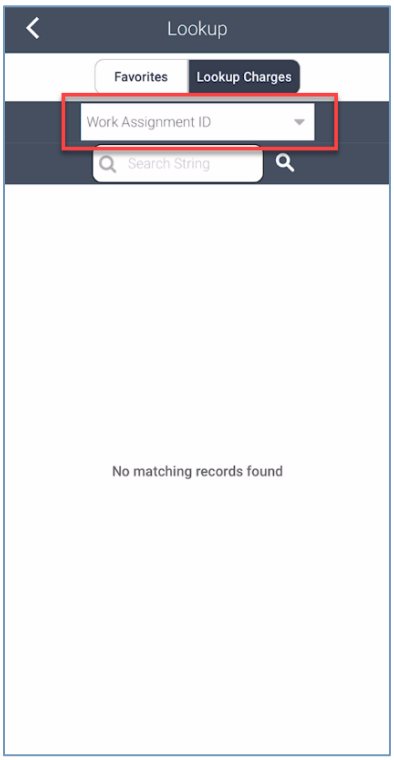
- When adding an expense report charge, the Default Charges screen displays the following fields.

Field	Description
Work Assignment ID	This field displays the work assignment ID associated with the expense charge.
Description	This field displays the work assignment description.
PO ID	This field displays the PO ID associated with the expense.
PO Line	This field displays the line number on the order.
Default Allocation %	This field displays the allocation percentage that was allotted to this charge.
ID	This field displays the numerical number that identifies the charge allocation.



Default Charges Screen

- When adding a timesheet charge or an expense charge, the Lookup screen displays **Work Assignment ID**, and the search is performed using **Work Assignment ID**.

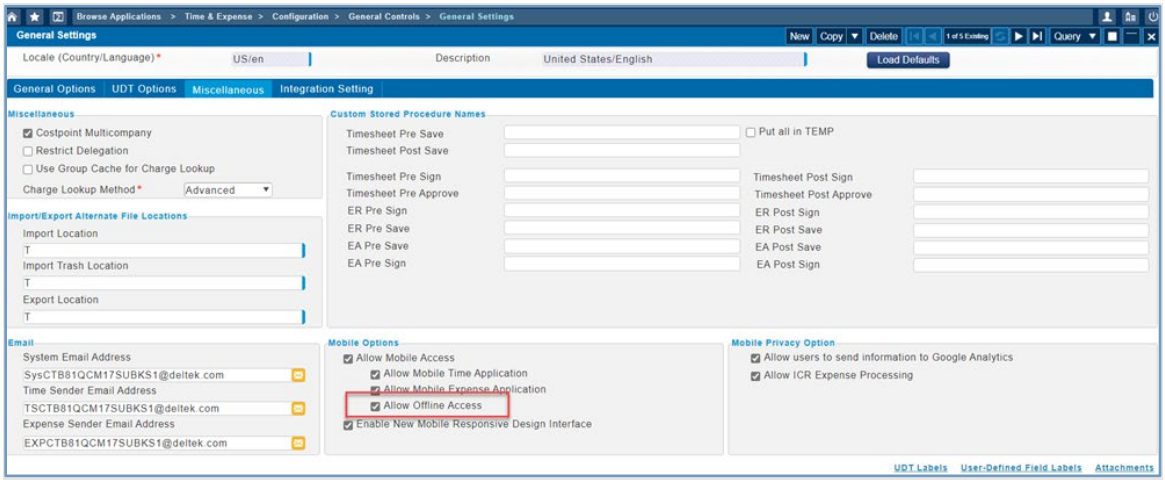


Lookup Screen

Offline Time Entry (8.1+)

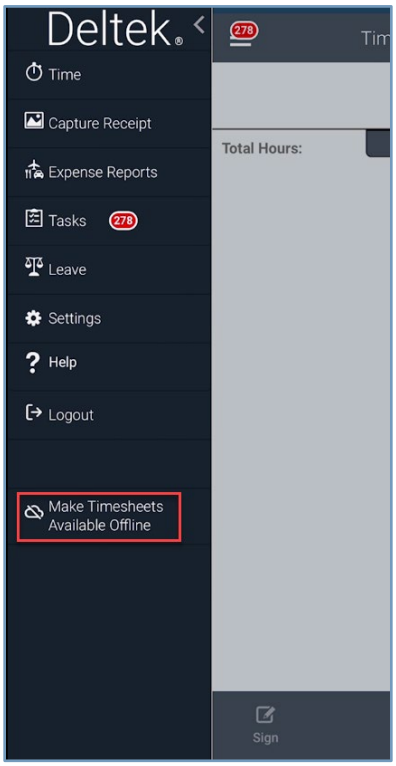
By using the Offline Time Entry feature, you can record timesheet charges while your mobile device is disconnected from the Internet. When you get back online, you can synchronize your offline timesheet charges to the Costpoint Time & Expense database.

To use the Offline Time Entry feature, your system administrator must provide you the timesheet offline access through the **Allow Offline Access** option in Costpoint Time & Expense.



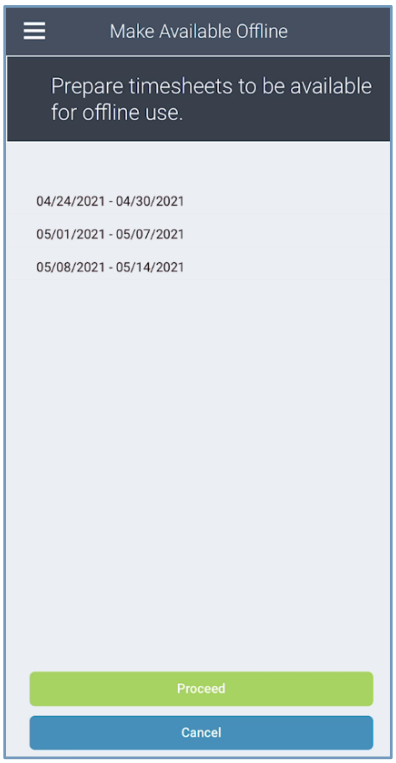
Miscellaneous Tab on the General Settings Screen

Once you have been provided with the timesheet offline access in Costpoint, the **Make Timesheets Available Offline** item displays on the Costpoint Mobile T&E application menu upon login.



Make Timesheets Available Offline on the Costpoint Mobile T&E Menu

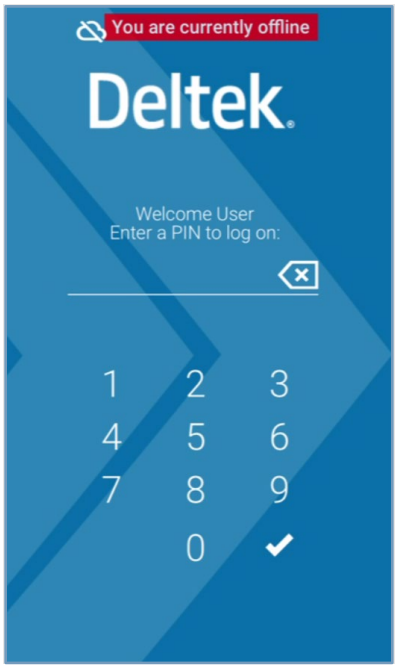
Tapping **Make Timesheets Available Offline** displays the Make Available Offline screen, which you use to download your timesheet data for the current, previous, and next periods to the Costpoint Mobile T&E application and make them available to you offline.



Make Available Offline Screen

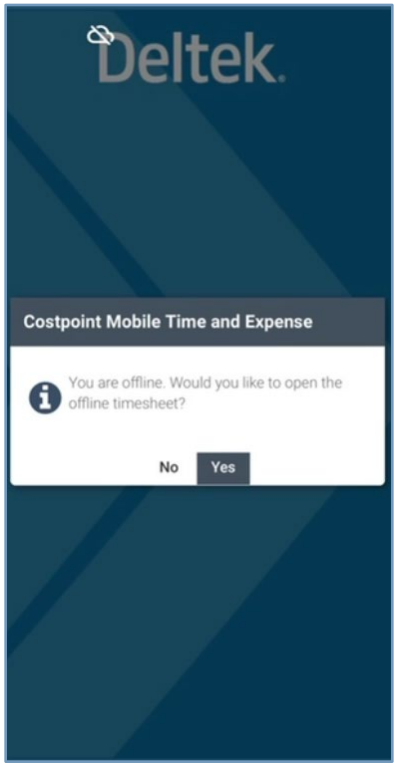
When you tap **Proceed**, timesheets with Open, Signed, Approved, Rejected, or Processed status or with the period flag set to Closed are available for download. Timesheets that are not yet created for a timesheet period or with no lines saved are not available for download. Take note that you must download the timesheets that you will use for time entry every time before you go offline. Otherwise, you will not be able to log into the application and use it while offline.

When you go offline, the Costpoint Mobile T&E application displays that you are currently offline on the Login screen.



Login Screen

Depending on your setup, log into the application using your PIN, biometric, or third-party authentication login credentials. The Costpoint Mobile T&E application displays the following screen:

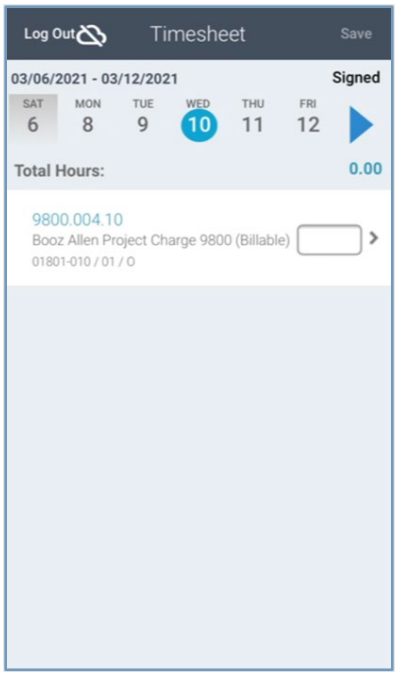


Login Screen

Only the Timesheet screen displays in the Costpoint Mobile T&E application when you tap **Yes**.

You can view your timesheet information on the Timesheet screen or add hours to existing timesheet lines by performing any of the following:

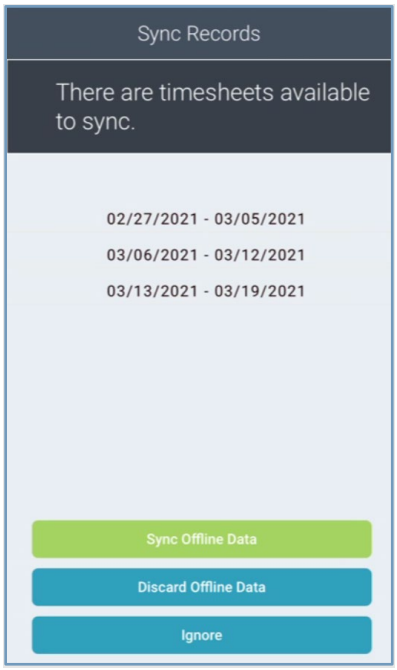
- Tap the hour field of the selected timesheet line to quickly enter time on a timesheet line.
- Tap anywhere outside the hour field on the timesheet line that you want to edit to display the Edit Charge screen, where you can enter time.



Offline Timesheet Screen

Note: You will not be able to sync records for timesheets with the period flag set to Closed or in a Processed status if you make changes to them when offline.

When you get back online, the Costpoint Mobile T&E application prompts you to sync or discard offline timesheet data through the Sync Records screen.



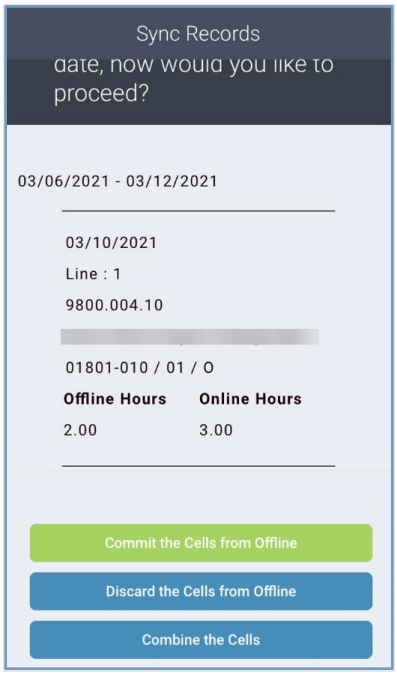
Sync Records Screen

The Sync Records screen only displays if you made changes to timesheets when offline. Otherwise, the screen does not display even if you downloaded timesheets for offline time entry. If you choose to sync offline timesheet data at a later time by tapping Ignore, the Costpoint Mobile T&E application always displays the Sync Records screen upon login.

Tapping **Sync Offline Data** on this screen also displays the Sync Records screen, with buttons described in the following table.

Button	Description
Sync Offline Data	Tap this button to sync offline timesheet data. When sync is complete, the Sync Records screen displays the completed timesheet periods. Tap **Done** to return to the Timesheet screen.
Discard Offline Data	Tap this button to discard offline timesheet data. Costpoint Mobile T&E displays the following message: "Offline data entered will be purged. Are you sure you want to discard?” ▪ Tap **Yes** to discard the offline timesheet data and return to the Timesheet screen. ▪ Tap **No** to return to the screen.
Ignore	Tap this button to return to the Timesheet screen and sync offline timesheet data at a later time. If you choose this option, Costpoint Mobile T&E always notifies you that there are offline timesheet data available to sync or discard during login or when you prepare for the offline time entry again.

If you have hours entered for a specific date while online besides the hours entered while offline, conflicts in data sync occur. The Sync Records screen displays the number of conflicts in your data sync. You need to take action for each conflict to complete the sync.



Sync Records Screen

The buttons on this screen are described in the following table.

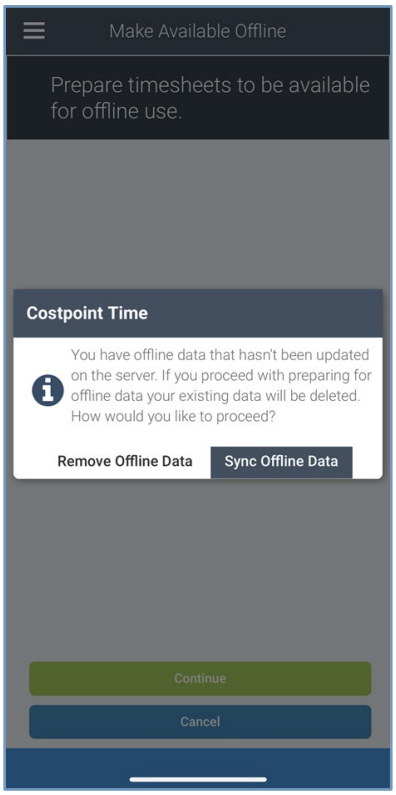
Button	Description
Commit the Cells from Offline	Tap this button to use the hours entered for a specific date while offline. When the sync completes, the Sync Records screen displays the completed timesheet periods. Tap **Done** to return to the Timesheet screen. **Note:** If you make changes to a timesheet period when offline, the Revision Explanation screen displays.
Discard the Cells from Offline	Tap this button to use the hours entered for a specific date while online and ignore the hours entered while offline. When the sync completes, the Sync Records screen displays the completed timesheet periods. Tap **Done** to return to the Timesheet screen.
Combine the Cells	Tap this button to combine hours entered for a specific date while online and offline. When the sync completes, the Sync Records screen displays the completed timesheet periods. Tap **Done** to return to the Timesheet screen.

Button	Description
	Note: If you make changes to a timesheet period when offline, the Revision Explanation screen displays.

When the sync completes, the Sync Records screen displays the completed timesheet periods.

Sync Records Screen

If you still have unsynced timesheet offline data and you tap **Make Timesheets Available Offline**, the Costpoint Mobile T&E application displays the following message:



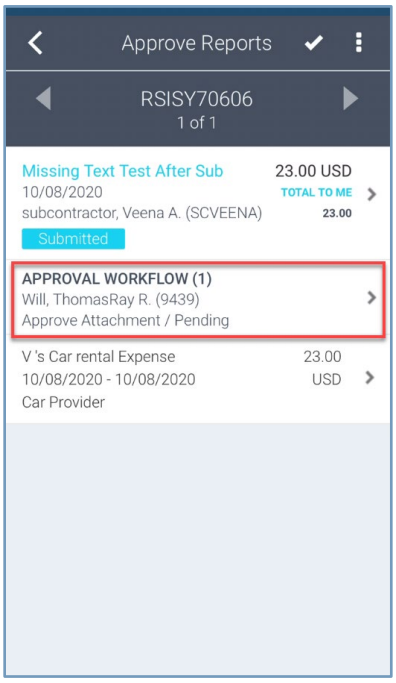
Make Available Offline Screen

The following table describes the button on this screen.

Button	Description
Sync Offline Data	Tap this button to display the Sync Records screen and to sync or discard existing offline timesheet data.
Remove Offline Data	Tap this button to delete existing timesheet offline data and proceed with downloading timesheet data for offline time entry.

Ability to View Expense Report Workflows (Pre 8.1)

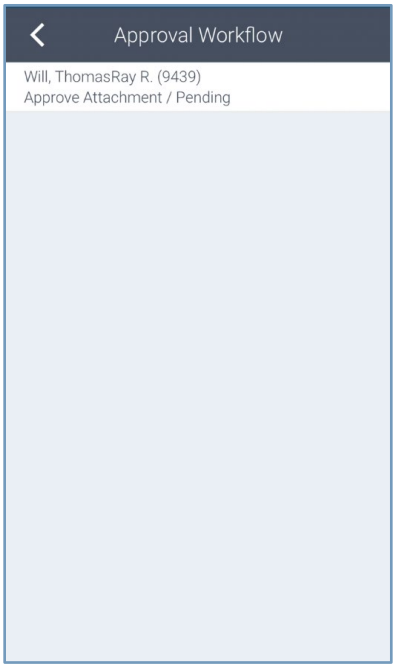
As a resource manager, you now have visibility to other approval workflows or tasks required for an expense report assigned to you. A read-only section called Approval Workflow is added to the Approve screens (Approve Reports, Approve Expense Charges, or Approve Attachments). The Approval Workflow section displays only if there are additional approval tasks assigned to the expense report other than the approval task you are currently viewing.



Approve Reports Screen

The Approval Workflow screen displays the following details related to the approval task:

- The approver to which the approval task is assigned
- The approval status (pending or completed)
- The approval type (approve report, approve expense charge, or approve attachment)



Approval Workflow Screen

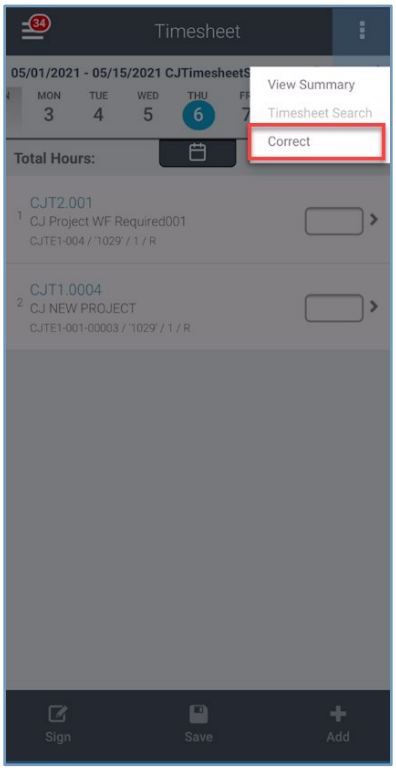
Time Correction (Pre 8.1)

The Time Correction feature is now available in the Costpoint Mobile T&E application, allowing you to modify previously processed timesheets using your mobile device.

The **Correct** button or the **Request Correction** button displays on the Timesheet screen, depending on how your timesheet has been configured.

If the timesheet status is Processed and the timesheet period is still open, the Correct button on the timesheet is available and enabled. Tap the **Correct** button to change the timesheet status from Processed to Open and modify the timesheet as needed.

If the timesheet status is Processed and the timesheet period is already closed, the **Request Correction** button on the timesheet is available and enabled. Tap the **Request Correction** button to send a timesheet correction request to the resource manager. You will receive a notification if the request is approved or rejected. If the timesheet correction request is approved, the **Correct** button on the timesheet becomes enabled, the timesheet status is changed from Processed to Open, and you can modify the timesheet as needed.



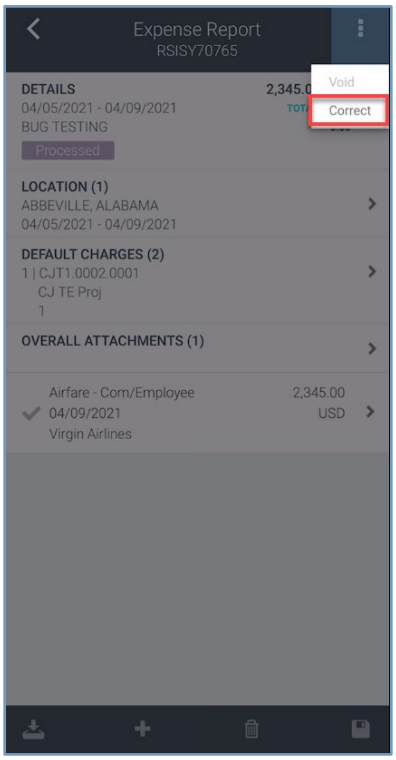
Correct Button on the Timesheet Screen

Expense Report Correction (8.0+)

The Expense Report Correction feature is now available in the Costpoint Mobile T&E application, allowing you to modify previously processed expense reports using your mobile device.

You can modify expense reports that have already been processed in Costpoint Time and Expense based on permissions set by your system administrator for your expense class or functional role.

If the expense report status is Processed, the **Correct** button on the expense report is enabled. Tap the **Correct** button to change the timesheet status from Processed to Approved and modify the expense report as needed.

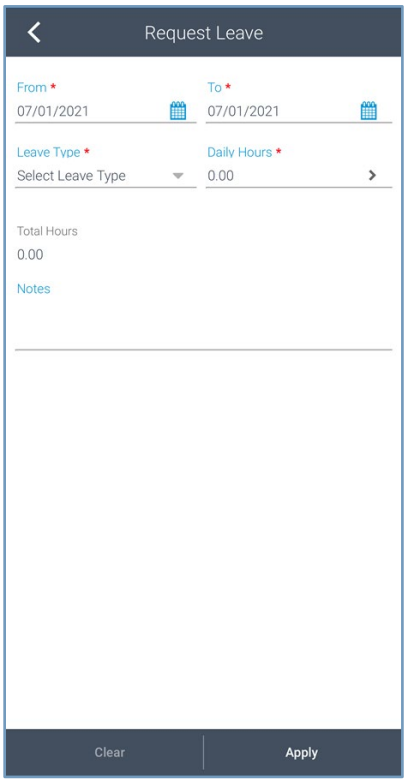


Correct Button on the Expense Report Screen

Leave Request Functionality (8.0+)

Aside from viewing your leave balances by type, you can now use your mobile device to submit leave requests (for resources) and approve or reject leave requests (for resource managers). Two screens, Leave Requests and Request Leave, are added to the Leave screen to support this new functionality.

The Request Leave screen displays when you tap on the Leave screen.



Request Leave Screen

The Request Leave screen contains the following fields.

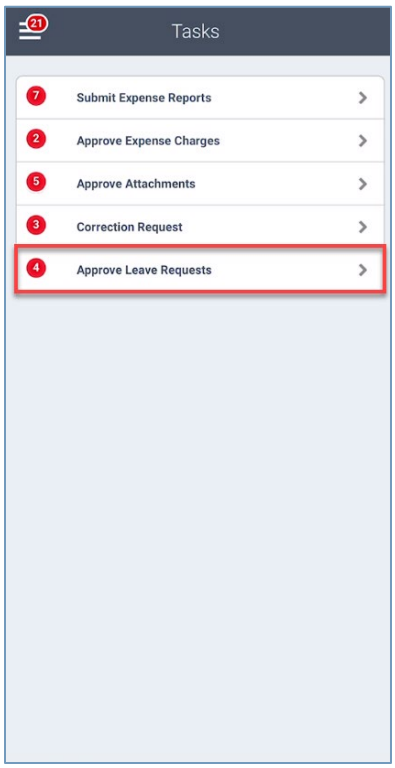
Field	Description
From	Tap the calendar icon to display the date picker and tap the start date for your leave request.
To	Tap the calendar icon to display the date picker and tap the end date for your leave request. If your leave request spans a full work day or less, use the same date in both the **From** and **To** fields
Leave Type	Tap this field to select the leave type you are submitting.
Daily Hours	Tap this field to enter the total hours for each day, if you are submitting a leave request for multiple days.
Total Hours	This field displays the total hours for the leave request
Notes	Tap this field to display the Notes screen and enter notes about your leave request.

Field	Description
Apply	Tap this button to submit your leave request. Your resource manager will be notified of the leave request through an email notification.
Cancel	Tap this button to cancel your leave request.

The leave requests you submitted using the Request Leave screen are displayed and summarized on the Leave Requests screen, which displays when you tap on the Leave screen. Each leave request entry displays the date and status of the leave requests and the number of leave hours. The leave requests listed on the Leave Requests screen are sorted by date, from newest to oldest.

Leave Requests Screen

For resource managers, the Tasks screen now displays the **Approve Leave Requests** category. Tapping **Approve Leave** Requests displays the Approve Leave screen, where you can approve or reject leave requests.

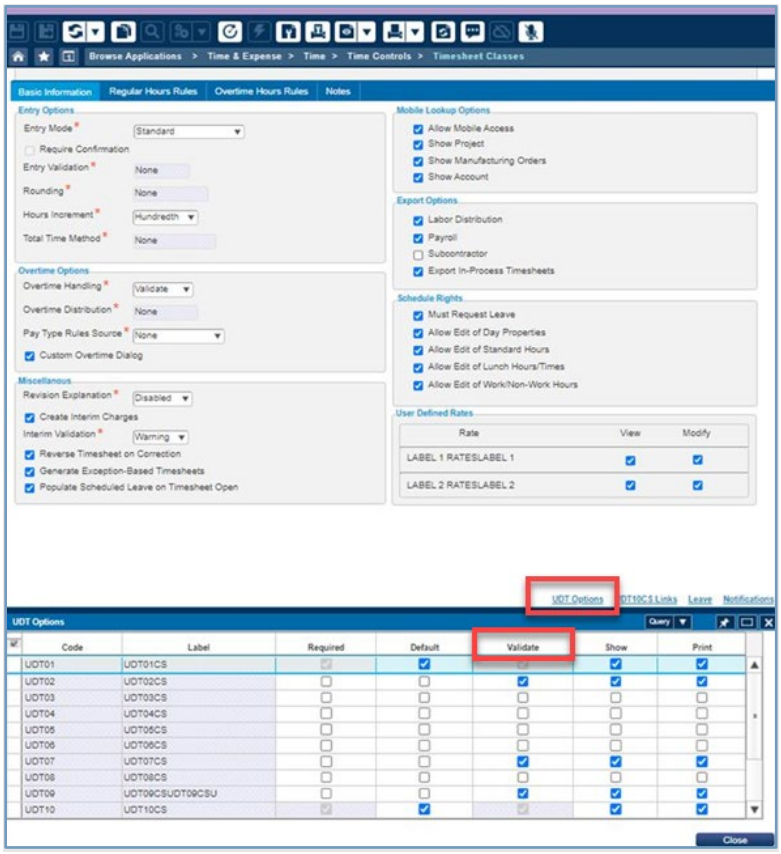


Tasks Screen

Allow Manual Entry of Data in the UDT Fields (Pre 8.1)

During timesheet editing, you can now manually enter values in the user-defined table (UDT) fields in the Costpoint Mobile T&E application by configuring the UDT field for manual entry in Costpoint Time & Expense.

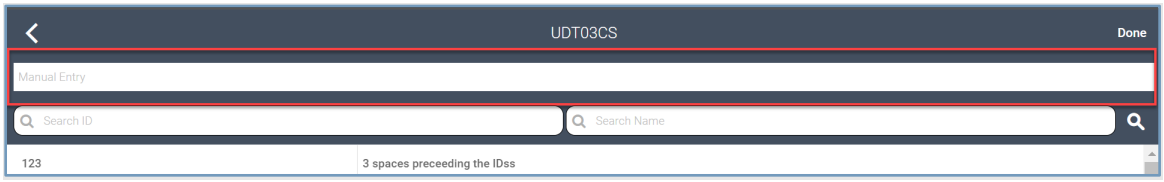
To enable this feature, navigate to **Time & Expense » Time » Time Controls » Timesheet Classes** in the Costpoint menu**,** click the **UDT Options** subtask**,** and clear the **Validate** check box of the UDT that you want to enable manual entry.



Basic Information Tab on the Timesheet Classes Screen

> **Note:** Manual entry is not allowed for Pay Type UDT (UDT10) regardless of the configuration of the Timesheet class in Costpoint.

When editing a timesheet on the Edit Charge screen, tapping a UDT field displays the **Manual Entry** field on the UDT screen.



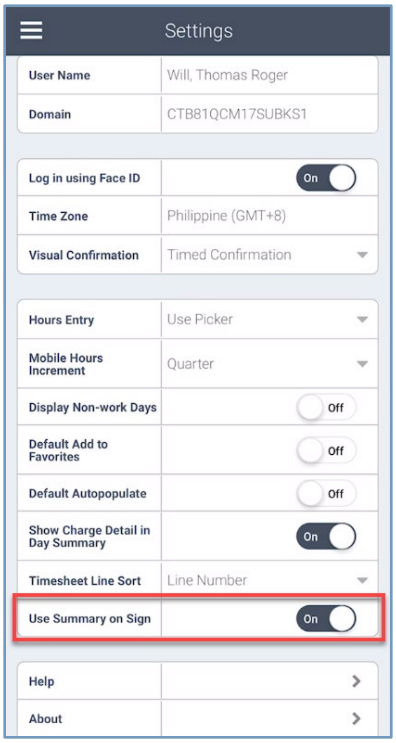
Manual Entry Field on the UDT Screen

Use the **Manual Entry** field to assign the appropriate value for the UDT field by entering or searching for the ID or name, and then tapping **Done**. When you tap **Done**, the Edit Charge screen displays, and the value you entered is populated in the UDT field. To clear the entry, click the circle icon in the field.

Summary Screen When Signing a Timesheet (Pre 8.1)

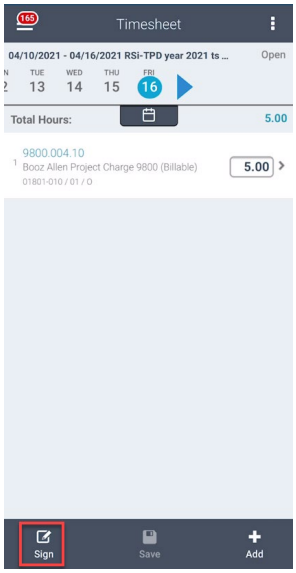
In order to view the total hours entered for a period before signing a timesheet, you can configure the Costpoint Mobile T&E application to display the Signature Certification screen either on the Timesheet

screen or on the Summary screen. The **Use Summary on Sign** field on the Settings screen displays or hides this new screen.

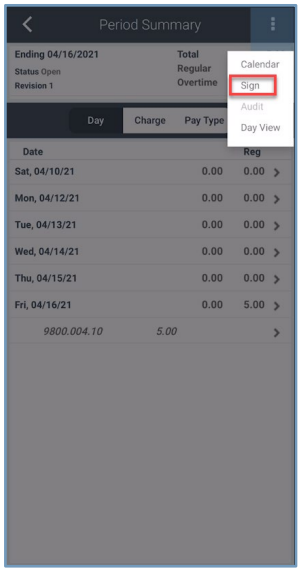


Use Summary on Sign Field on the Settings Screen

When the **Use Summary on Sign** field is enabled (On), the Signature Certification screen displays after tapping **Sign** either on the Timesheet screen or on the Summary screen.

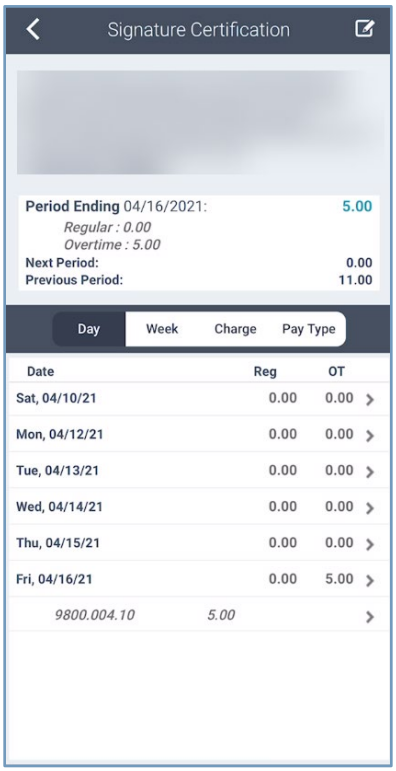


Timesheet Screen



Summary Screen

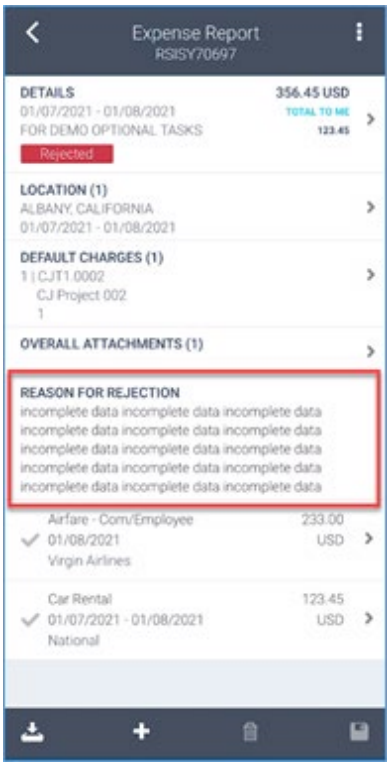
Using the Signature Certification screen, you can view the total, regular, and overtime hours for the selected period as well as the previous period and next period hour information before signing a timesheet and submitting it for approval.



Signature Certification Screen

Reason for Rejection Section Added to Expense Reports (8.0 +)

The Reason for Rejection section is added to an expense report with Rejected status. This provides an easier way for a resource to know the reason why an expense report is rejected, as opposed to relying on the rejection notification.



Reason for Rejection Section on the Expense Report Screen

The Reason for Rejection section displays the reason for rejection entered on the Reason screen when a resource manager rejects an expense report.

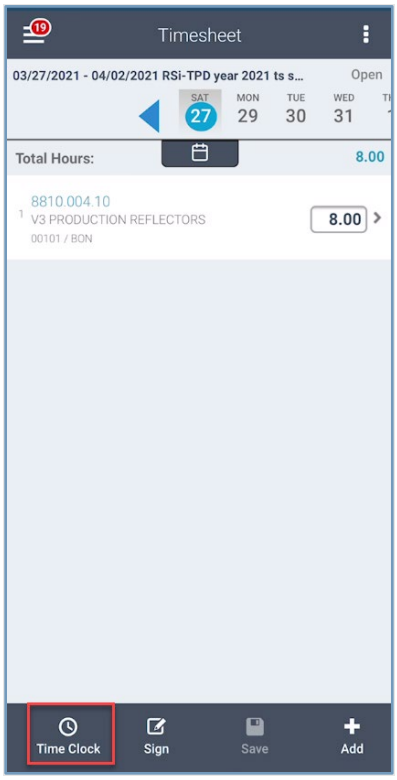
Clocking for Timesheets (8.1+)

If your company uses the Start-Stop Time or the Time In-Out feature, the related screens will be available through the Costpoint Mobile T&E application, allowing you to easily track and record start and stop times for each new task and for breaks and meals.

- If the Start-Stop Time feature is configured in Costpoint, the Start-Stop Time screen becomes available in the Costpoint Mobile Time and Expense application.
- If the Time In-Out feature is configured in Costpoint, the Time In-Out screen becomes available in the Costpoint Mobile Time and Expense application.

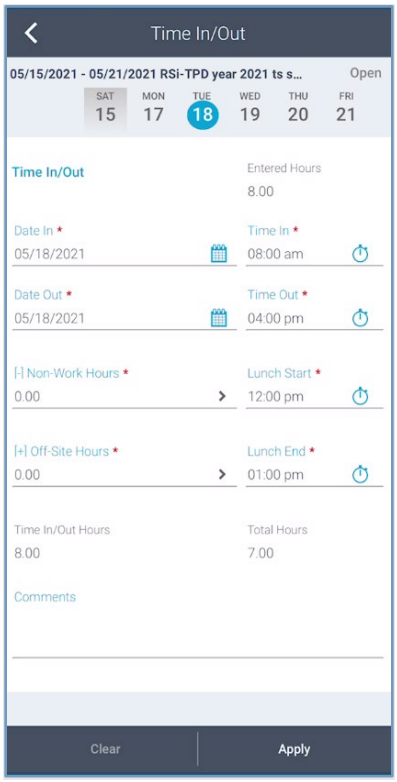
Time In-Out Feature

Use the Time In-Out feature to record your starting and stopping times and your lunches and breaks. If the Time In-Out feature is configured, **Time Clock** displays on the Timesheet screen.



Timesheet Screen with Timesheet Class Configured to Time In-Out

Tap **Time Clock** to display the Time In-Out screen and record your starting and stopping times and your lunches and breaks.



Time In-Out Screen

The fields on the Time In-Out screen are described in the following table.

Field	Description
Date In	Tap this field or the calendar icon to select the date. Eligible dates are the date you select and the same date minus one day.
Date Out	Tap this field or the calendar icon to select the date. Eligible dates are the date you select and the same date plus one day.
Time In	Tap this field or the clock icon to select the time that you started working in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM. The default value for a new entry is the end time for on-site work from the employee's work schedule.
Time Out	Tap this field or the clock icon to select the time that you stopped working in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM.

Field	Description
	The default value for a new entry is the end time for on-site work from the employee's work schedule.
Lunch Start	If lunch start and end times are being tracked, tap this field or the clock icon to select the time that you went for lunch in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM.
Lunch End	If lunch start and end times are being tracked, tap this field or the clock icon to select the time that you returned from lunch in an hour and minutes format. Valid hours are 01 to 12. Valid minutes are 00 to 59. Select AM or PM.
[-] Non-Work Hours	Tap this field to select the number of hours between the Time In and Time Out hours taken for breaks and other non-work activities. Do not include lunch hours.
[+] Off-Site Hours	Tap this field to select the number of hours (besides the hours between the Time In and Time Out hours) that are off-site hours. These hours are not included in the time in and out calculation.
Time In/Out Hours	This field displays the gross hours, calculated by subtracting Time In from Time Out.
Total Hours	This field displays the total number of hours recorded for the day.
Comments	Tap this field to enter comments for the day.
Apply	Tap **Apply** to validate the time in and out times and to close the Time In-Out screen. The Costpoint Time and Expense database is updated with time in and out information when you save the timesheet.
Clear	Tap **Clear** to delete your entries on the Time In-Out screen.

Start-Stop Time Feature

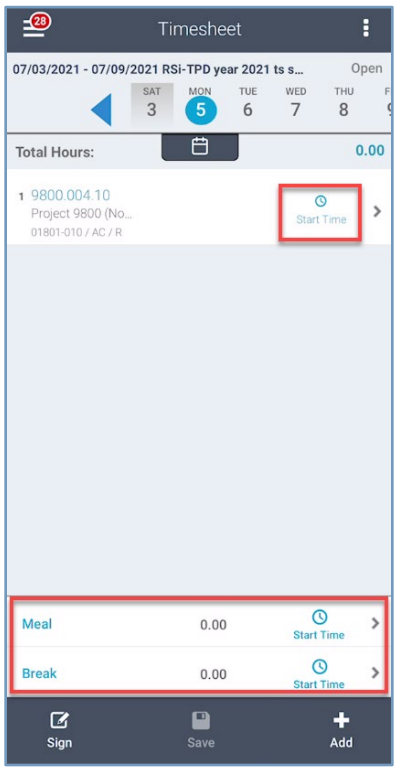
Use the Start-Stop Time feature to record start and stop times for each new task and for breaks and meals. The related Start-Stop Time screens displayed on the Costpoint Mobile T&E application depend on how your Timesheet Class is configured for the Start-Stop Time feature.

Start/Stop Detail and Start/Stop Summary

If your Timesheet Class is configured to **Start/Stop Detail** or **Start/Stop Summary**, you can enter start and stop times for individual timesheet charge rows, meals, and breaks.

The following sections display on the Timesheet screen:

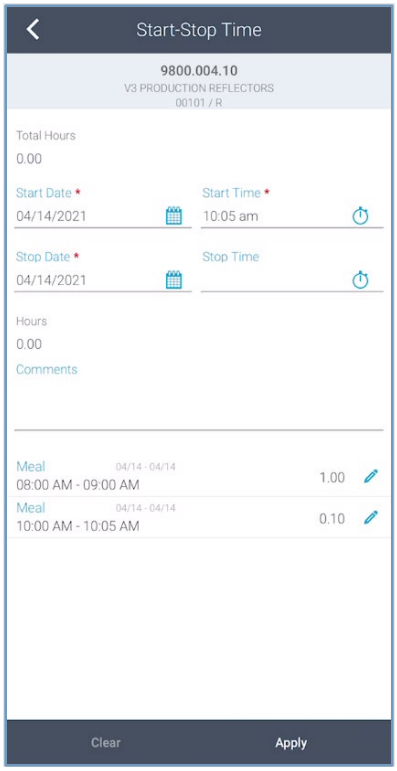
- **Break**: Tap this section to display the Start-Stop Time Break screen and enter start and stop times for a non-meal break. After entering your start and stop times, tap **Apply** to save your entries and return to the Timesheet screen, where the total number of non-meal break hours recorded for the day is displayed.
- **Meal**: Tap this section to display the Start-Stop Time Meal screen and enter start and stop times for a meal break. After entering your start and stop times, tap **Apply** to save your entries and return to the Timesheet screen, where the total number of meal hours recorded for the day is displayed.
- (labeled **Start Time**) displays next to the hour field of each timesheet charge row. Tap the icon to display the Start-Stop Time screen and enter start and stop times for the individual timesheet charge rows. After entering the start and stop times, tap **Apply** to save your entries and return to the Timesheet screen, where becomes red (labeled **Stop Time**), and the gross hours displays in the hour field.



Timesheet Screen with Timesheet Class Configured to Start/Sop Detail or Start/Stop Summary

The Start-Stop Time screen header displays the type of charge for which you are entering the start and stop times. For example, if you tap next to the timesheet charge on the Timesheet screen, the

header displays the timesheet charge name. If you tap **Meal** on the Timesheet screen, the header displays **Meal**.



Start-Stop Time Screen with Timesheet Class Configured to Start/Stop Detail or Start/Stop Summary

The following table describes the fields on the Start-Stop Time screen with Timesheet Class configured to **Start/Stop Detail** or **Start/Stop Summary.**

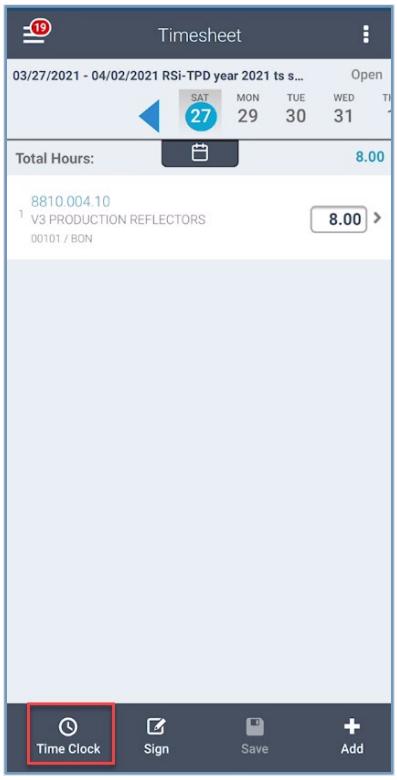
Field	Description
Total Hours	This field displays the total number of work period hours recorded for the day.
Start Date	Tap this field or the calendar icon to select the date on which the time period began.
Start Time	Tap this field or the clock icon to select the starting time of the break, meal, or work period.
Stop Date	Tap this field or the calendar icon to select the date on which the time period ended.
Stop Time	Tap this field or the clock icon to select the ending time of the break, meal, or work period. You can leave this field blank as long as it is the only record without a stop time and is for the latest start/stop time line for the date.

Field	Description
Hours	This field displays the gross hours, calculated by subtracting Start Time from Stop Time.
Comments	Tap this field to enter a short note concerning the break, meal, or work period.
Apply	Tap **Apply** to validate the start and stop times and to close the Start-Stop Time screen. The Costpoint Time and Expense database is updated with start and stop time information when you save the timesheet. When you return to the Timesheet screen, the total number of non-meal break or meal hours recorded for the day is displayed on the corresponding section. If you enter start and stop times for a timesheet charge, becomes red (labeled **Stop Time**), and the gross hours are displayed in the hour field.
Clear	Tap **Clear** to delete your entries on the Start-Stop Time screen.

Break Tracking

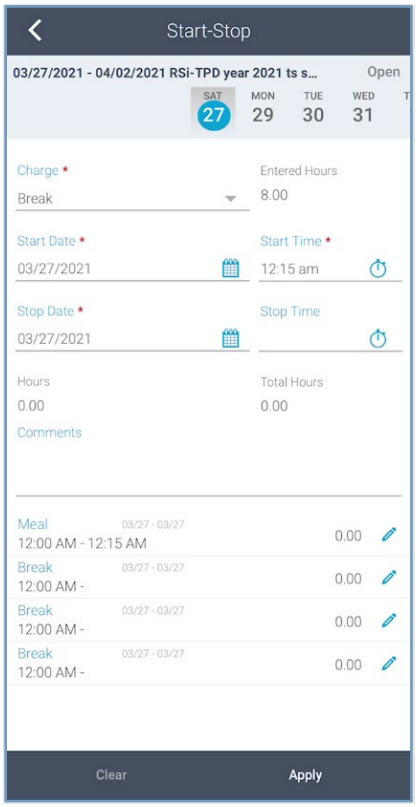
If your Timesheet Class is configured to **Break Tracking**, you can enter start and stop times for breaks and meals.

Time Clock displays on the Timesheet screen if your Timesheet Class is configured to **Break Tracking**.



Timesheet Screen with Timesheet Class Configured to Break Tracking

Tap **Time Clock** to display the Start-Stop Time screen and enter start and stop times meals and breaks.



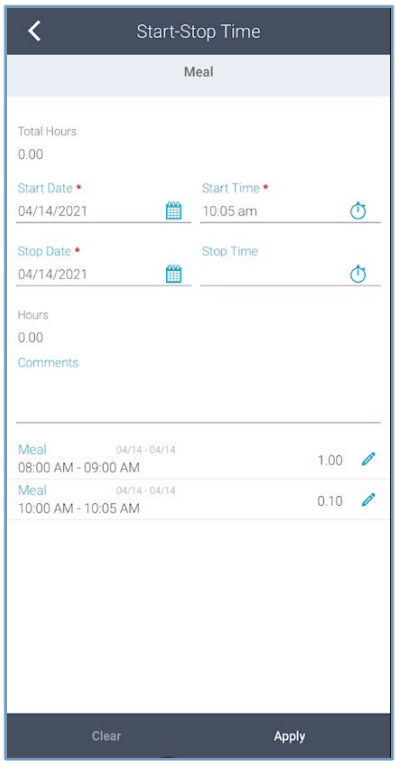
Start-Stop Time Screen with Timesheet Class Configured to Break Tracking

The following table describes the fields on the Start-Stop Time screen with Timesheet Class configured to **Break Tracking**.

Field	Description
Charge	Tap this field and select the type of charge for which you are entering start and stop times. Your options are: ▪ **Meal**: Tap **Meal** to enter start and stop times for a meal break. ▪ **Break**: Tap **Break** to enter start and stop times for a non-meal break.
Entered Hours	This field displays the gross hours, calculated by subtracting Start Time from Stop Time.
Start Date	Tap this field or the calendar icon to select the date on which the time period began.
Start Time	Tap this field or the clock icon to select the starting time of the break or meal.
Stop Date	Tap this field or the calendar icon to select the date on which the time period ended.

Field	Description
Stop Time	Tap this field or the clock icon to select the ending time of the break or meal. You can leave this field blank as long as it is the only record without a stop time and is for the latest start and stop time lines for the date.
Comments	Tap this field to enter a short note concerning the break or meal.
Total Hours	This field displays the total number of work period hours recorded for the day.
Apply	Tap **Apply** to validate the start and stop times and to close the Start-Stop Time screen. The Costpoint Time and Expense database is updated with start and stop time information when you save the timesheet.
Clear	Tap **Clear** to delete your entries on the Start-Stop Time screen.

The bottom part of the Start-Stop screen displays the time entries recorded for the timesheet line for the day. You can edit or delete a time entry in this section.



Line Location Section

- To edit a time entry, tap next to it. The Start-Stop Time screen is populated with data you saved for the time entry. Enter or specify the values in the appropriate fields, and tap **Apply** to save your changes.
- To delete a time entry, swipe the time entry that you want to delete from the list, and then tap **Delete**.

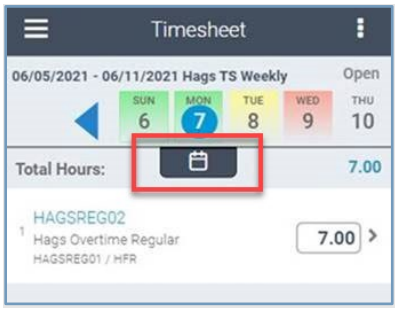
Improved Timesheet Screens (Pre 8.1)

The look and feel of the Timesheet screen have been updated for a better user experience.

- The date carousel is now color coded.
  - **Blue**: This color indicates that the date is the selected date.
  - **Gray**: This color indicates that the date is a non-work day.
  - **Green**: This color indicates that the date is an approved leave.
  - **Red**: This color indicates that the date has a pending leave approval.
  - **Yellow**: This color indicates that the date is a holiday.

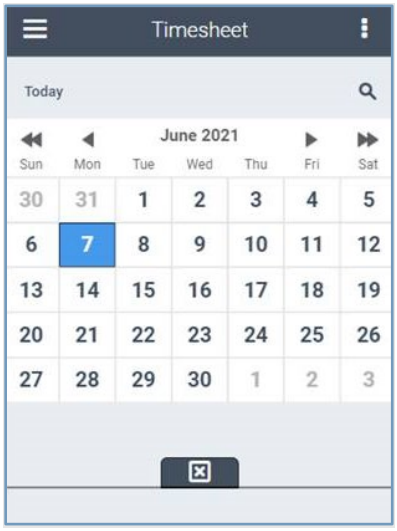
Date Carousel on the Timesheet Screen

- The calendar icon has been moved below the date carousel.



Timesheet Screen

Tap to display the Calendar screen.



Calendar on the Timesheet Screen

To perform a search on the Calendar screen, tap , and then tap the appropriate values on the date picker. To close the Calendar screen and return to the Timesheet screen, tap .

- Additional design improvements have been applied to the Timesheet screen:
  - The icons at the bottom of the screen now have labels.
  - The **Total Hours** font size is bigger.
  - The total hours font color is now blue.

Timesheet Screen

ICR Plugin Update (Pre 8.1)

The intelligent character recognition (ICR) plugin for processing and data extraction has been updated to its latest version.

Support for PHP 8.0.8 (Pre 8.1)

The Costpoint Mobile T&E Server has been upgraded to support PHP 8.0.8.

Enhanced Capture of Credit Card Receipt Information

Note: See this same section in the Time & Expense section for details on the new fields added to Capture Receipt.

Reports & Analytics

This section describes Costpoint 8.1 enhancements for the Reports & Analytics domain.

Costpoint Business Intelligence

The following sections include updates to Costpoint Business Intelligence.

New Costpoint BI Packages with Reports

New Employee Model and Modified Reports

A new secured Employee model, which contains employee data including skills, security clearance, and certifications, is now available.

New versions of the following reports, which were created against this new Employee model that supports organization security and labor suppression, are also available:

- Employee Information Report
- New Hires and Termination Report
- Attrition and Retention Report

The legacy reports are still available.

New Labor Model and Modified Reports

The new Labor model, which leverages reporting from unposted and posted timesheet data, is now available. Organization security and labor suppression are also supported.

- **Labor Utilization Report**: This is the modified version of the legacy report which utilizes the timesheet tables in the new Labor model.
- **Employee Labor Report**: This new report displays both posted and unposted records in order to present the total number of labor hours for employees.

New Expense Model and Reports

The new secure Expense model, which supports functional role security, is now available. There are two new expense reports:

- **Expense Charge Activity Report by Project**: This report shows the expenses per employee by project, expense report ID, expense type, date, and total amounts.
- **Expense Report (for Resource Manager)**: This report shows the daily expenses per employee with expense ID, expense type, dates, and amounts.

Subcontractor Content

For customers that leverage the Subcontractor module, there is a new Subcontractor Management model to easily create reports and dashboards that include subcontractor content such as Vendor, Vendor Employee, and the related Work Assignment Information. You can also include reports and dashboards to help you understand Subcontractor invoicing and PO status. Two reports are also available:

- Subcontract Status Report
- Work Assignment Charge Detail Report

Smart AI

To assist you in creating reports, dashboards, and explorations, Deltek enhanced the Smart AI folder to include a significant amount of new content in addition to content released in the Samples Folder in Costpoint BI 8.0. Smart AI now has pre-built data sets, data modules, and common dimensions that you can use in creating BI content and leveraging the AI capabilities. The data modules support project and organization security.

Data Sets	Data Modules
▪ AR Summary Data ▪ GL Summary Data ▪ Labor History Data ▪ Planning Data ▪ Project Summary (PSR) Data ▪ Purchase Order Data ▪ Receipt Data ▪ Resource Management Data	▪ Accounts Receivable ▪ General Ledger ▪ HR Management ▪ Labor History ▪ Planning ▪ Project Summary (PSR) ▪ Purchase Orders ▪ Resource Management

Dimensional Data Sets	Dimensional Data Modules
▪ Accounts ▪ Companies ▪ Customers ▪ Employee Certifications ▪ Employee Degrees ▪ Employee Salary Information ▪ Employee Skills ▪ Employee UDEFs ▪ Employees ▪ GL Financial Statement Lines ▪ Items ▪ Organizations ▪ Planning Projects UDEFs ▪ Planning Projects ▪ Project UDEFs ▪ Projects ▪ Relative Fiscal Periods ▪ Resources	▪ Relative Time ▪ Accounts ▪ Companies ▪ Customers ▪ Employees ▪ GL Financial Statement Lines ▪ Items ▪ Organizations ▪ Performing Organizations ▪ Project UDEFs ▪ Projects ▪ Resources ▪ Subperiods

Dimensional Data Sets	Dimensional Data Modules
▪ Subperiods	

See the Costpoint BI Smart AI guide for more details on the Smart AI content.

In addition to the Data Sets and Data Modules, there are pre-built dashboards that can be leveraged out of the box. Some of these dashboards are also available against the relevant packages, but these will run on the new Smart AI components and provide better performance. These dashboards are:

- Executive Dashboard
- Project Planning
  - Organization Manager
  - Project Manager
  - Resource Manager
- Projects
  - Organization Manager
  - Project Manager

In addition to these dashboards, there are two new dashboards for HR Management and Supplier Performance described below.

Smart AI for Human Resources Management

The Smart AI for HR Management data module and dashboard is now available for HR Management and Departmental Management users. With this new Smart AI module, users will be able to:

- Understand head count trends and be able to slice and dice the data by Home Organization, Gender, Race, Age, Tenure as well as many other attributes including Employee UDEFs.
- Perform salary analytics including historical promotions and salary increases.
- Analyze Turnover Rates by Termination Reason including drill to terminated employee reports.
- Understand the future staffing needs from Costpoint Planning.
- Access employee skills, education, and other credentials.

Human Resource Managers can now access a pre-built dashboard to understand these performance metrics as well as create their own dashboards, leverage the AI Assistant, and perform Data Explorations to uncover relationships in the data that helps prescribe corrective actions.

Smart AI—Supplier Performance

This feature includes a data module and a dashboard to better understand Supplier performance metrics including:

- % of Late, On time, and Early Deliveries by Vendor
- % Rejected Orders
- Top 25% Purchased Parts

Procurement Managers can now access a pre-built dashboard to understand their suppliers' performance metrics as well as create their own dashboards, leverage the AI Assistant, and perform Data Explorations to uncover relationships in the data that helps prescribe corrective actions.

New Costpoint BI Content (Reports/Dashboards)

New Project Ledger Detail Report in the Project Package

The new Project Ledger Detail Report is now available for BI Project users. This report is an enhanced version of the legacy Project Ledger Detail Report in the General Ledger area, but uses the secured Project package where you can apply labor suppression, model security, and/or project manager security. Report options to display amounts, transaction amounts, or both are available as well.

New Field in the Contracts and Opportunities Package

In alignment with the new Cybersecurity Maturity Model Certification (CMMC) Level on the Manage Opportunities screen, the CMMC Level field is now available in the Contracts and Opportunities model in Costpoint BI.

New User Groups for the New Models

New user groups are now available for use for the new secured models:

- CER Employee Secure (CER__EMPL_SECURE)
- CER Expense Secure (CER__EXPENSE_SECURE)
- CER Subcontractor Management Secure (CER__SUBK_SECURE)
- CER Labor Secure (CER__LABOR_SECURE)

Additional User-Defined Fields in Some Team Content Packages

Additional user-defined fields or UDEFs are now available in packages so that you can utilize them in creating reports and dashboards. The list of updated packages and their corresponding UDEFs are:

- **Materials**: Items, Sales Order Entry, and Serial/Lot
- **Procurement**: Vendor
- **Contracts Reporting**: Contract
- **Accounts Payable**: Vendor
- **Manufacturing**: Engineering Change Notice
- **Employee**: Employee
- **Labor**: Employee

The View VBI_ALL_UDEF does not exclude any UDEFs by table type. If you need to expose a UDEF type, the view will have this information, and you can update a particular FM package to pick them up.

Benefit Enrollment Report

The new Benefit Enrollment Report is now available for users who have access to the HR area. The reports displays the list of benefit enrollment choices for an employee and their dependents. The output from this report can be used as exported data for the benefits providers.

PO Payment and Remaining Balance Report

The PO Payment and Remaining Balance Report is now available for Costpoint Procurement users. They can generate the report by date, purchase order number, organization, and vendor. This report displays the total purchase order (PO) amount and payments made through PO vouchers and/or cash disbursements, including the balance remaining in the PO. The selection of the currency type, which can either be functional or transactional currency, is also available.

Vendor Exclusion List Report

The new Vendor Exclusion List Report, which shows a list of purchase orders where the vendor is flagged as active on the Sam.gov Exclusion List, is now available.

The Exclusion List indicator and warnings were added to Costpoint 8.0, and this new report helps track changes to vendors with open purchase orders, so users can take appropriate action.

New Effective User Rights Report

The Effective User Rights Report is now available for use and is part of the Costpoint Enterprise Reporting for Costpoint Administration. This report displays the effective module and function rights for Costpoint users in table format.

Updates to Costpoint BI Packages and Content

Updated Costpoint BI Packages

Several packages were updated in Costpoint BI 8.1.

- Planning
  - Added the **Last Period Closed** field to the Planning models to know for which period EAC the calculation was made
  - Added the **Final Version** and **Version Code** fields
  - Added **Earned Value Data for Update Project Progress %** and **Calculate Earned Value** tables
  - Added a **New Business Active** flag
  - Updated packages to reflect table changes
- Projects
  - Project Roles in Project Reporting Model: In addition to project managers, you can now select, sort, and group by the newly added project role capability.
  - Added the **Award Fee Amount Funded** and **Project Value Award Fee Amount** header fields to the PSR
  - Added the **Contract ID** and **Opportunity ID** fields to the Proj Table
  - Added the Multi-currency fields to the Project reporting model for Billing Currency
- Time/Expense
  - Updated packages to reflect table changes.
- Procurement/Materials
  - Added Supplier Portal fields
  - Added PO Line Flags & Codes query items
  - Added PO Header-Acknowledgement Date
  - Added RFQ and Quote Data
  - Added Inventory Count Data

Updated Costpoint BI Reports/Dashboards

- The Current Reporting Period was added to Dashboards for informational purposes.

- Tenant ID (DB connection) was added to the header of all non-legacy reports in order to display and identify the source of the report, which can be PROD, TEST, CONFIG, or SBOX.
- The drill reports of the MO Component Report were updated with additional columns and notifications.
- The Purchase Order now has PO Line Delivery Schedule, PO Header Notes, and PO Type Filter.
- The Procurement Dashboard now has a PO Type Filter and a drill report from the PO Status Chart.
- You can now filter the PO Commitments Detail Report by Org.
- Requisition Pending Report has been renamed as Requisitions Pending PO Conversion.
- The Approvers Name and Date of Approval are now on the Requisitions and Approved Requisitions drill-thru reports.
- The verbiage for the reminder on the Indented Bill of Materials and Summarized Bill of Materials reports has been modified.
- Order Status and Lead Time were added to the Manufacturing Dashboard.
- The Work center Dispatch tab was added to the Manufacturing Dashboard.

Admin

This section describes Costpoint 8.1 enhancements for the Admin domain.

Launch Emails and Phone Calls from Costpoint

You can call and email contacts directly from Costpoint on your computer or device. Click or tap the **Call** icon in a phone field to call a contact directly from the Costpoint field. When you initiate a call, the default calling app on your device will prompt you to accept the number to make a call. If you want to place calls from a different app, you must change the default calling app on your computer or device.

Click or tap the **Send Email** icon in an email field and Costpoint will open a new email with the contact's address in the **To** field. Costpoint uses the default mail app on your computer or device. If you want to send emails from a different app, you must change the default mail app on your computer or device.

Command-Line Deployment for Extensions and Web Services

A new command-line API will let you deploy a folder that contains exported Web Services zip files and Extensibility Project zip files to desired systems. Before this enhancement, you had to install extensions manually using the Costpoint DBwizard, Integration, or Extensibility Consoles. This enhancement will make it easier for you to automate the install of Extensions and Web Services.

To invoke the API, you have to run the CPWebDeployExtAndWsApi.cmd file, located with all other Costpoint command files in the \deltek\costpoint\81\bin folder. Before running the CMD file, you must specify the system name to use and the folder that contains the zip files to deploy as parameters. Once they are entered, you can run the CMD file. The API will produce a log file with detailed records of what was done.

More information about deploying web services is available in the Deltek Costpoint 8.1 Integration Overview Guide and the Deltek Costpoint 8.1 DB Wizard Utility Guide.

Active Directory Support

Costpoint now supports Active Directory 2019 and will continue to support Active Directory 2016.

Recently Used in Auto-Complete

When you select a field with the Lookup feature, the six most recently used values will display at the top of the auto-complete dropdown list. You will also have the option to remove recently used values from the list. This feature is available in online and offline modes.

Descriptions for Auto-Complete ID and Code Fields

When you tab or place the cursor into a field that uses an ID or code, the autocomplete drop-down list will display the ID or code and their description. When you select the value, only the ID or code will fill in the field.

Hey Deltek! Voice Interaction Settings

Use the Hey Deltek! virtual personal assistant to enter and manage data in Costpoint using your voice. Costpoint will use the microphone on your computer or device to listen to your commands. You can use one of the following options to give Costpoint access to the microphone:

- Click on the Global Toolbar.
- Click **Voice** on the Options menu.
- Select the **Enable Hey Deltek! Voice Interaction** check box in Configure User Preferences.

Hey Deltek! voice interaction is supported on Chrome, Windows, and Android operating systems.

New settings are also available to support voice interaction with Costpoint. Hey Deltek! voice interaction is enabled for all users by default, but you can disable it manually.

- To disable this feature for all users in the system settings, click **Admin » System Administration » System Administration Controls » Configure System Settings**. On the General Settings tab, clear the **Enable Hey Deltek!** check box.
- To disable Hey Deltek! for certain users, click **Admin » Security » System Security » Manage Users** and then clear the **Enable Hey Deltek!** check box for a user.
- To disable Hey Deltek! on your device, click on the Navigation Toolbar, and click **Configure User Preferences**. And then, click **Disable Hey Deltek!** on the Configure User Preferences screen. Your device will no longer listen to you.

  To disable Hey Deltek! for all of your devices, clear the **Enable Hey Deltek! Voice Interaction** check box.

For information about voice interaction in other domains, go to Hey Deltek! for Time Entry and Hey Deltek! in Manage Leads and Contacts.

Push Notifications

New Notification Message Prompt

When you log in to Costpoint on a supported browser (Chrome, Edge, or Firefox) or device (Apple devices currently not supported), you will receive a message prompt to allow notifications if your system or user preferences indicate that you want to receive device notifications. You will be able to choose from the following options:

- **Turn On Notifications**
- **Remind Me Later**
- **No Thanks**

Your response will be stored in local device cookies. If you choose **No Thanks**, you will not be prompted again until you clear site cookies or select the **Reset** option on the Costpoint login page. If you select **Remind Me Later**, Costpoint will prompt you two weeks later.

New Push Notification Option

Device Notification is a new notification option in Costpoint that will provide Costpoint alerts on your laptops and Android devices using the notifications that are native to Android devices. You do not have to be logged into Costpoint to receive and respond to notifications. For example, you can conveniently approve a workflow alert directly from the notification without opening Costpoint, as long as you're logged in to Windows and have your browser open.

After you subscribe to device notifications in Costpoint, your device browser should also prompt you to subscribe to Costpoint notifications. If you choose to subscribe, you will receive alerts on that device, via its native notification method. For example, if you subscribe to notifications on a laptop, the alerts will display in the Windows notification window. If you want to receive notifications on multiple devices, register and subscribe to Costpoint notifications in your browser, on each device. If you find that you are

receiving too many Costpoint notifications, you can always change your notifications on a given device or in your user preferences to not receive them any longer.

Enhanced Notification Method Field

The **Preferred Notification Method** field will include the **Device Notification** option and will also be updated with multi-select functionality that allows you to search for notification options and select one or more results. The options available will depend on what's configured for the company. Apply Device Notification:

- As a system-wide default notification in Configure System Settings (SYMSETNG)
- As your notification preference in Configure User Preferences (UPMUSRPR)
- As the default notification method for new users in Manage Users (SYMUSR)

Define Notification Methods for Notification Types

You can further select or refine your selection of the notification methods you want to use for different notification types on the new Notification Override subtask in Configure System Settings and Configure User Preferences. Choose one or more notification methods for the following notification types:

- Approval workflow
- Administrative messages
- Job server notifications
- T&E employee notifications
- T&E other notifications

SMS Message Notifications

The new SMS Message notification method lets Costpoint inform you of application updates using SMS messages.

- On the Configure System Settings screen, administrators can choose **SMS Message** in the **Preferred Notification Method** field.
- On the Manage Users screen, administrators can choose **SMS Message** in the **Preferred Notification Method** field to give users access to SMS message notifications. Administrators can enter a mobile phone number in the **Phone** field and selecting the mobile carrier in the new **Mobile Carrier** field.
- On the Configure User Preferences screen, users can choose **SMS Message** in the **Preferred Notification Method** field. Costpoint will send SMS message notifications to a user if the **Phone** field contains a mobile number and the associated mobile phone carrier is selected in the **Mobile Carrier** field.

Offline Mode

There are a variety of reasons to work in Offline mode. For example, you might want to work in an area that has no Internet, or you might have a slow or intermittent Internet connection. In Offline mode, you can view records in applications, update records, and add records. When you reconnect to the Internet, you can synchronize your updates to the Costpoint database.

To work in Costpoint offline:

- Prepare application records for offline access.

- Log in to Costpoint in Offline mode.
- View, add, or update data.
- When you reconnect to Costpoint online, review and edit the updates, add new or keep original data, and merge or discard the updates.

Offline mode is supported on Windows OS, as well as Android and iOS mobile devices.

Offline capabilities are available in Costpoint and Time and Expense on laptops and mobile devices when accessed through the browser/PWA. The native Costpoint Mobile Time and Expense application also supports Offline mode but does not have the same capabilities.

Security Settings for Offline Mode

By default, Offline mode is disabled. Administrators can enable the applications that will be used offline. Once an application is enabled, any user can use the application in offline mode on a laptop or mobile device.

In Configure System Settings, administrators can select the **Allow Offline Access** setting to enable all users the ability to use Costpoint offline. When this setting is enabled, administrators can choose which applications are available for offline access on the new Offline Access Applications subtask on the General Settings tab.

To require additional biometric authentication in Offline mode on laptops, administrators can select the **Encrypt Offline Data on Laptops** security setting on the Security Settings tab.

By default, all offline data stored on mobile devices is encrypted. Only the user who stored the data can access it. To support this level of security, the user must use TouchID or FaceID on a phone or tablet the first time they prepare the data for Offline mode. TouchID or FaceID is also required to log in to Offline mode. No upfront setup in Costpoint is necessary for this security.

Many IT organizations already have fully encrypted laptops, so Costpoint does not encrypt offline data on laptops by default. However, if desired, an administrator can require offline data encryption (**Encrypt offline data on laptops** option in System settings). In this case, a laptop user (same as on mobile devices) must use FIDO identification to initialize offline mode and log in offline. The FIDO identification method can be any option supported by Windows Hello (fingerprint, FaceID, PIN) or an external/USB FIDO security device.

Prepare Records for Offline Use

The new **Make Available Offline** option lets you prepare application records for Offline mode. You can access this option from the Application Toolbar or the Options menu.

When you click this option, Costpoint downloads the first 10 records from the application for offline access. However, Costpoint will store additional records as you navigate an application that is prepared for offline use. Alternatively, you can select any number of records for offline access, and then select **Make Available Offline** to prepare the records.

Log In to Costpoint in Offline Mode

Select the new **Offline** check box on the Login screen to log in to Costpoint in Offline mode. Offline updates are automatically stored for upload later.

Review Updates Online

You can review your updates when you reconnect to Costpoint online. Costpoint highlights the fields and screens in the applications where the changes occurred. You can select a highlighted field to review or compare the current value in the database with the new value you added offline. You can change back to

the current value, keep the update you made offline, or override these values with a new value. After you review your updates, you can save or discard your changes.

Manage Offline Data

The new Manage Offline Data feature is an advanced option for maintaining your offline data and is available on the Application Toolbar and Options menu. Click the arrow on the **Make Available Offline** option to access the Manage Offline Data window.

This window also allows you to select and prepare records for offline use; however, the Manage Offline Data window provides more visibility than the **Make Available Offline** option. It shows what data is available offline so that you can manage it. For example, you might want to remove sensitive data that is stored offline, or you might need to clear old records to make space for new records.

Track Login Attempts

Costpoint offers security logging that enables security engineers to capture and track end-user login activity for analysis. This enhancement helps provide audit trails for incident response and management when an incident occurs.

Improved Handling of Single User Processes

When you run a process from the Action menu of an application, you can now run the process in the background using the new **Run in background** link that displays on the Progress Meter dialog. This option is available while a process is pending or running. When you click **Run in background**, the process will continue to run, even when you close the application before the job's completion.

Costpoint is also updated to handle multiple single-user processes at one time. Previously, you could not start a new process, such as posting or preprocessing, until Costpoint completed another user's process. Now, multiple users can submit processes from the Action menu in an application while Costpoint runs another process.

To handle multiple processes, Costpoint will place the submitted process at the bottom of the job-server queue and run the processes in the order in which they were submitted. The Progress Meter dialog box will show the number of pending processes in the queue.

Also, you no longer need to define a job queue or save a parameter before you run a process from the Action menu.

Use the View Action and Report Status screen to see the processes and reports you executed. Use the Manage Job Queues screen to see the scheduled processes in the job queue.

Costpoint Configuration Utility Update

The Systems tab in the Costpoint Configuration Utility now includes a new read-only view for CMS integration setup. You can continue to set up CMS integration on the CMS tab.

Updated Set Up Company (SYPCOMP) Process

When you create a new company, the **Company to Copy Settings From** process will copy the the **DPAS Rating Print Threshold (Func Curr)** setting (PO_PRNT_OPT.AUTO_PRINT_AMT) in Configure Purchase Order Print Options (POMPOPTS) from the selected company and apply it as the default setting in the new company.

See the Materials section for more information on the Add DPAS Rating on PO Lines, Printed PO, and Supplier Portal Emails/Screen feature.

Improved FIDO Login for Discoverable FIDO Keys

A new option to register a FIDO device for kiosk mode authentication (authentication via shared laptop or tablet) is available on the FIDO/Biometric Device subtask in Configure User Preferences (UPMUSRPR). When you register a FIDO device, select the new **Resident key (Kiosk Mode)** check box to authenticate to Costpoint using only the FIDO/biometric device without providing a username and password. Do not select the **Resident key (Kiosk Mode)** check box if you do not use kiosk mode authentication.

Batch Processing with Parameters

When an application was submitted to the job batch, it ran the process based on how the saved parameters were set at the time of processing. In Costpoint 8.1, the job batch runs the process with the parameters at the time the job is submitted and will permit the submission from unsaved parameters.

Costpoint Mobile/PWA

This section describes Costpoint 8.1 enhancements for Costpoint Mobile/PWA.

List View Enhancements

The List View is improved with the following UI updates:

- Rows that displayed with a 3d effect now show as a flat list.
- The blue Approval button has been removed from the application bar.
- The Approve option in the Swipe Left menu is renamed to **Approval** to match the desktop application.
- The colors of the **Approval** button and menu option match the status of the row item:
  - Blue: Not Started
  - Gold: In Process
  - Green: Approved
  - Red: Reject

List View for Portrait Orientation

Most screens in Costpoint now display initially as a List View in Portrait orientation, replacing the table view that previously displayed in Portrait orientation.

Mobile View Updates for Opportunities and Contracts

When you access Costpoint 8.1 in a mobile device, the following functionalities are enabled for Manage Opportunities and Manage Contracts:

- **List View**: List View automatically displays for both applications in portrait mode. Records are presented in a consolidated list, giving you a snapshot on each of the records that display.

  In Manage Opportunities, each opportunity record displays three lines with information on the opportunity name, ID, and stage as well as the opportunity's primary customer.

  In Manage Contracts, each contract record displays three lines with information on the contract name, ID, and status as well as the prime contract number.
- **Saved query tabs**: When you save queries in Manage Opportunities and Manage Contracts, these queries display as tabs across the top of the List View to give you easy access to your queries.
- **Swipe functionality**: When you are in List View in portrait mode, you can swipe a record to the left to see the **More** and **Delete** options. When you tap **More**, the **Copy Record** and **Clone Record** actions display.

> **Note:** All three features are also available in Manage Leads and Contacts, while Opportunities Quick View supports List View and saved query tabs.

Other aesthetic enhancements were implemented so you get a cleaner look of your data in mobile devices. The updates include, but are not limited to, the following:

- Applied larger font to match general font size used in Costpoint Mobile

- Expanded some data fields
- Fixed alignment of some fields and columns
- Applied two-column data rule in Form View in landscape mode

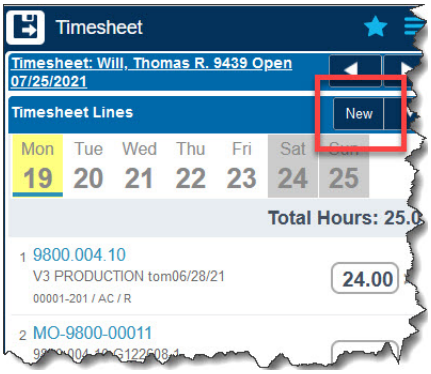
These cosmetic changes are applied to Manage Opportunities, Manage Contracts, and View Contract Financial Information.

Time & Expense Charge Lookup User Interface Update

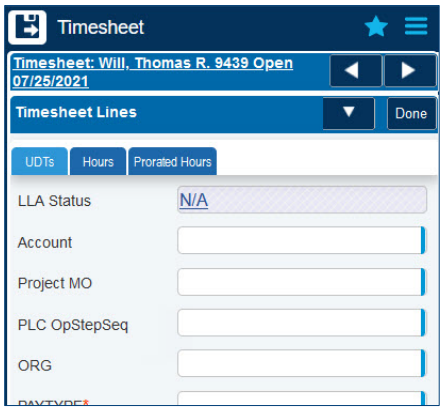
The Costpoint PWA charge Lookup interface in **Timesheet » Timesheets » Timesheet** was updated with a new look and feel to improve ease of use. The user interface redesign promotes efficient charge tree navigation for mobile users.

After you open your timesheet in Costpoint PWA, complete the following steps to add a charge:

1. Click **New** in the Timesheet Lines table to create a line on the timesheet.

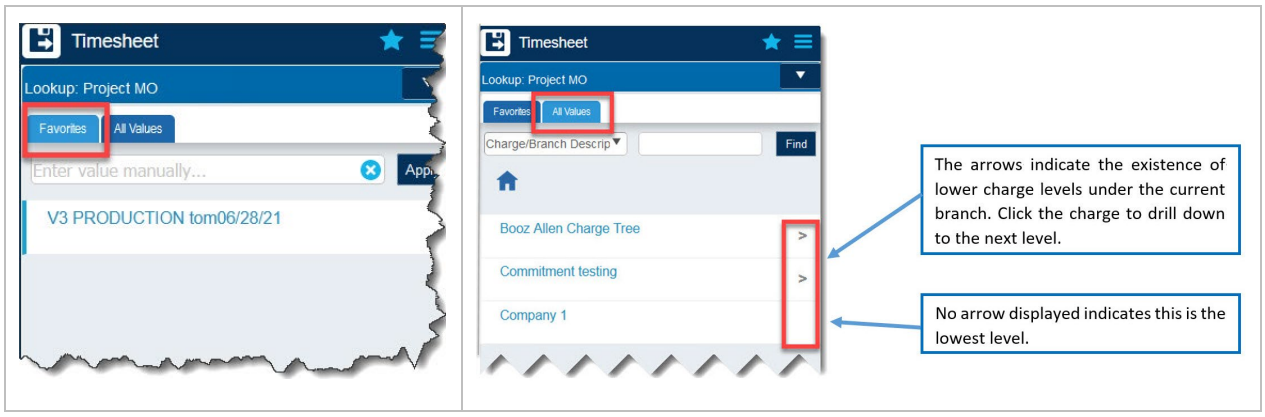


2. On the UDTs tab, click the field in which you want to perform a charge lookup:

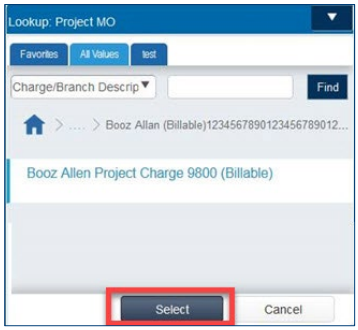


The above image is an example only. The fields and field labels can vary by company.

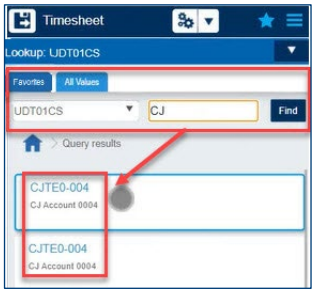
On the Lookup screen, the **Favorites** tab displays your saved favorite and recent charges, and the **All Values** tab allows you to drill-down to all available charges:

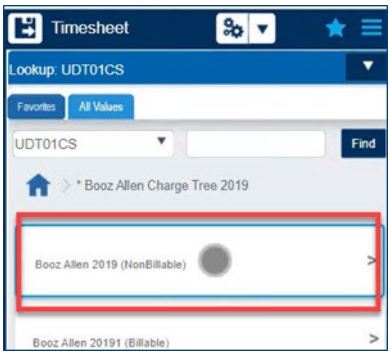
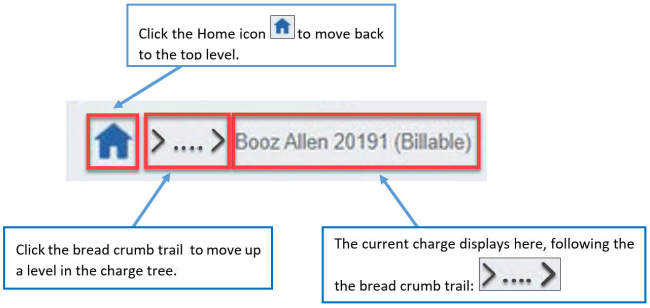
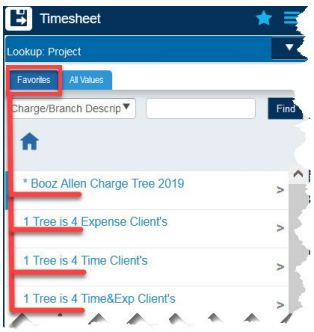


3. After you drill-down to the appropriate charge level, click **Select** to add the charge:



The following table presents additional actions and functions associated with the updated Charge Lookup:

Actions and Functions	Description
Enter values manually for direct lookup	If you know the first letters/numbers of a charge code, enter them here.
Query for charges	 Enter charges in the Query field and tap **Find**. The results of your search display below.

Actions and Functions	Description
Drill down into the charge tree	 Tap the relevant charge to drill down to lower levels of the charge tree.
Navigate using the bread crumb trail	 From the bottom level charge you can navigate up and down the bread crumb path: ▪ Return to the top level of All Values via the Home icon ▪ Display midlevel charges by tapping > .... >.
Find your favorite and most often used charges under the **Favorites** tab	 Up to twenty of your most recently accessed charges display on this tab.

Materials PWA Updates

Layout changes will be made to Approve Purchase Requisitions for an easier approval flow on a mobile device in both landscape and portrait view.

Platform Changes

In addition to the platform updates mentioned below, you can use the Compatibility Matrix to view requirement and integration information by Deltek product.

The following information can be obtained from the matrix:

- Server Software Requirements
- Additional (Optional) Server Software Requirements
- Client Software Requirements
- Deltek Product Integration

Access the Compatibility Matrix through the Deltek Support Center:

KB Article 38499

MS SQL Server Version Support Update

Costpoint 8.1 now supports SQL Server 2019.

Windows Server OS Version Support Update

Costpoint 8.1 now supports Windows 2019.

Oracle Version Support for Costpoint 8.1

Costpoint 8.1 now supports Oracle Database 19c.

Important Changes to Costpoint Web Services in Costpoint 8.1

Costpoint 8.1 is currently targeted for release to on-premise clients in September 2021. Costpoint 8.1 will only support "Generic" Web Services. Customers who are now using non-Generic Web Services should modify their existing non-Generic Web Services to be a Generic web service. Refer to the following knowledgebase article in the Deltek Support Center for more information:

KB Article #103526: Important Changes Coming to Costpoint Web Services in Costpoint 8.1 - Action Required Now

Installation Instructions

There are no new installation instruction changes currently planned for Costpoint 8.1.

De-supported Applications

The following application has been de-supported in Costpoint 8.1.

Domain	Module	Application	Screen Title
Administration	System Administration » System Administration Interfaces	AOPRPDAT	Transfer Resource Planning Data

Costpoint will no longer support legacy web services, except for PFMG web services. You can convert your old/legacy web services to Generic web services before upgrading to Costpoint 8.1. Refer to this knowledge base article for details:

KB article

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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