Deltek Costpoint® 7.1.1

Cumulative Release Notes for December 2018

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Contents

Overview

This document is a compilation of the release notes distributed for the enhancements made in Costpoint, Budgeting and Planning, and Time & Expense in December 2018. This document includes descriptions of the enhancements in relation with system jars, application jars, libraries, and regulatory updates since the last system jar release.

> **Note:** Release notes contain summaries of the enhancements made. Refer to the online help for additional details.
>
> Costpoint 7.1.1 Online Help

Platform Changes

Weblogic 12.1.3 and 12.2.1.3 Critical Patch Update

The Costpoint 7.1.1 Framework Update installer is updated to include support and compatibility for Weblogic 12.1.3 and Weblogic 12.2.1.3 Oracle Critical Patch Update (October 2018). The update addresses security vulnerabilities.

System Requirements

This enhancement requires the following:

- jdk1.8.0_192.exe
- p28298916_121300_Generic.zip
- p28298734_122130_Generic.zip

Installation Instructions

Custom Programs Affected

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Support Center at https://deltek.custhelp.com before you install the update.

To Download the HotFix/Feature Update:

1. From Internet Explorer, go to https://dsm.deltek.com.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Support Center credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

To Install the HotFix/Feature Update:

Refer to the installation instructions posted on Deltek's Support Center site, https://deltek.custhelp.com.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.
- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.
- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

To Check to See if the HotFix is Installed:

1. Open the application that was updated.
2. Click **Help** > **About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

To Check to See if the Feature is Installed:

1. Click **Help** > **About Costpoint** from the Costpoint toolbar.
2. Open the Features subtask and click the Feature that was just installed.
3. Open the Applications subtask. Check the list of applications and their corresponding application jars and see if they are correct and have been successfully deployed (highlighted in green).
4. Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

Note: Most of the features installed have their corresponding patches, but not all.

More Information:

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

Costpoint

Accounting

There are no changes to Costpoint Accounting in this release.

Contracts

Ability to Import FAR and Regulatory Clauses to Contract and Subcontract Records

The Manage Contracts and Manage Subcontracts screens have been updated to allow you to import Federal Acquisition Regulation (FAR), Defense Federal Acquisition Regulation Supplement (DFARS), and other regulatory clauses into the FAR Clauses/Provisions and Supplemental Regulations subtasks of these screens.

With this enhancement, you no longer need to look through contracts and manually find the regulatory requirements. You can now pull regulatory clauses from contracts and import them into contract and subcontract records with more ease and less errors. You will also be able to track the regulatory clauses that are linked to the contract, which will help you ensure that you are in compliance with the terms of the contract.

Screen Updates

Import FAR/Supplemental Regulation Files Subtask

A new subtask, Import FAR/Supplemental Regulation Files, is now available on the Contract Info tab and Subcontract Info tab of the Manage Contracts and Manage Subcontracts screens, respectively. Use this subtask to import FAR, DFARS, and other regulatory clauses from comma-separated files into the contract or subcontract record.

You can import two types of regulatory clauses using Import FAR/Supplemental Regulation Files, each type updating one subtask:

- The **FAR Clause/Provision** type updates the FAR Clauses/Provisions subtask.
- The **Supplemental Regulation** type updates the Supplemental Regulations subtask.

You must create separate input files for the two types as they have different file layouts and update different subtasks.

> **Attention:** You can download the template CSV files from the Deltek Support Center site at https://deltek.custhelp.com. The four template CSV files available are:
>
> - CNTRFAR.CSV (Contract FAR)
> - CNTRSREGS.CSV (Contract Supplemental Regulations)
> - SUBCNTRFAR.CSV (Subcontract FAR)
> - SUBCNTRSREGS.CSV (Subcontract Supplemental Regulations)

There are two ways you can upload the input files:

- You can access the input file from the network by using alternate file locations.

- You can upload the input file to the Costpoint database.

If you choose the first option, click the **File Location** field on the Import FAR/Supplemental Regulation Files subtask to select an alternate file location. If you choose the second option, leave the File Location field blank and use the File Upload Manager to upload the input file to the Costpoint database.

When you import files and errors are found, Costpoint displays the Import FAR/Supplemental Regulation Files Error Report. Review the error report and fix the errors before re-uploading the input files. When you have successfully imported the input files, Costpoint updates the FAR Clauses/Provisions and/or Supplemental Regulations subtasks. You must save the record before the updates can be reflected in the respective database tables.

Attention: See the online help for more information on using the Import FAR/Supplemental Regulation Files subtask of Manage Contracts and Manage Subcontracts. The following topics are included in the online help of each screen:

- Import FAR/Supplemental Regulation Files Subtask
- Step-by-Step Procedures on Importing Files
- Input File Information
- Error Messages

Page Reference No Field

A new field, Page Reference No, has been added to the FAR Clauses/Provisions and Supplemental Regulations subtasks of Manage Contracts and Manage Subcontracts. Use this field to enter the reference number where the FAR or supplemental regulatory clause is located within the contract for a given page.

System Requirements

This enhancement requires the following:

- cp711_cmnlib_CTLIB_011.zip
- PATCH3564

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_012.zip
Contracts	Contracts	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_013.zip

Projects

There are no changes to Costpoint Projects in this release.

People

There are no changes to Costpoint People in this release.

Regulatory and Compliance

2018 Calendar Year End (CYE) and Affordable Care Act (ACA) Updates

IMPORTANT NOTES

Warning: Unless specifically noted in the release notes, this state tax update and any future federal and state tax table changes will require the following:

☐ System JAR 054 for Costpoint version 7.0.1

☐ System JAR 028 for Costpoint version 7.1.1

Versions 7.0.1 and 7.1.1 - Calendar Year End 2018

Please be aware that you must have the following System JARs loaded before loading this Calendar Year End 2018 release.

Calendar Year End 2018 System JAR Requirements

- ☐ Costpoint 7.0.1: System JAR 054 (released June 2018)
- ☐ Costpoint 7.1.1: System JAR 028 (released April 2017)

Note:

- **System JAR 054 for Costpoint 7.0.1** introduced an update to the Colorado state tax withholding tables. In response to the federal tax code overhaul (Pub. L. 115-97), the Colorado Department of Revenue announced an update to their Allowance table on April 2, 2018 (effective April 1, 2018). This required an update to Costpoint Compute Payroll, which can only be released through a System JAR in Costpoint version 7.0.1.
- **System JAR 049 for Costpoint 7.0.1 and System JAR 028 for Costpoint 7.1.1** introduced a much needed change to the State Filing Statuses in Costpoint. Rather than using filing statuses that only applied to Costpoint (Both, Miscellaneous 1, Miscellaneous 2, etc.) and had to be manually mapped to each state's actual filing statuses, Costpoint 7.0.1 and 7.1.1 have been updated to use each state's actual filing status(es). Though the new filing statuses were introduced in April 2017, Deltek will continue to support tax table updates based on the original state filing statuses for the remaining 2018 tax updates. Any tax updates for 2019 will only support the new state filing statuses that were introduced in System JAR 049 for 7.0.1 and System JAR 028 for 7.1.1 (both released in April 2017).

Warning: In order to update the old state filing statuses to the new state filing statuses, you must run the Update State Filing Statuses utility which you can access by going to **People** » **Payroll** » **Payroll Utilities** menu. You must run this utility before you can load any tax table updates released by Deltek starting in January 2019.

Version 7.1.1 – Further Reductions in the Need to Release Regulatory Updates within System JARs

We are happy to announce that we made several programming changes to limit the need for regulatory changes to be released via System JAR. System JAR 028 for Costpoint 7.1.1 was part of that effort. The coding changes introduced in System JAR 028 for Costpoint 7.1.1 allowed us to disassociate payroll computation coding changes from future 7.1.1 System JAR releases. So, after System JAR 028, changes to Costpoint version 7.1.1's Compute Payroll application will not require deployment via System JAR as they did in the past. This not only means that we can deploy Costpoint 7.1.1 regulatory updates and fixes more quickly, but it will also help us keep the System JAR requirements for Calendar Year End releases as minimal as possible.

The changes we made with the noted System JARs will greatly help with that effort to minimize the System JAR requirements for future regulatory releases.

Installation Prerequisites

Ensure the following are installed and operational:

- Costpoint Version 7.1.1
- PATCH3465
- PATCH3520
- PATCH3556
- PATCH3567
- PATCH3573

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
People	Benefits	HBP1094C	Create 1094-C and 1095-C Electronic File	cp711_hbp1094c_012.zip
People	Payroll	PRMW2	Manage W-2s	cp711_prmw2_005.zip
People	Payroll	PRPW2F	Create Federal W-2 File	cp711_prpw2f_006.zip
People	Payroll	PRPW2S	Create State W-2 File	cp711_prpw2s_014.zip
People	Payroll	PRRW2	Print W-2s	cp711_prrw2_005.zip
People	Payroll	PRRW2R	Print W-2 Summary Report	cp711_prrw2r_004.zip

Updates and Enhancements

This section includes:

- Federal updates
- State updates

Federal Updates

Federal Tax Updates

The following are updates to federal taxes:

- Social Security Limit: $132,900
- 401(k) Deferral Limit: $19,000
- 401(k) Wage Limit: $280,000
- Safe Harbor Affordability Rate: 9.86%

W-2 Form and USERRA Make-Up Amounts for 2017

The following new Box 12 codes have been added for 2018 W-2 filing:

- **GG** — (money field) Income from qualified equity grants under section 83(i)
- **HH** — (money field) Aggregate deferrals under section 83(i) elections as of the close of the calendar year

This release updates the following Costpoint W-2 applications to support the new Box 12 codes.

- **Create Federal W-2 File (PRPW2F)**

  The application now has the ability to generate a Federal W-2 file with the new GG and HH Box 12 codes in corresponding fields of the RO and RU records. The new Box 12 codes are available in the following positions in the Federal W-2 file:

  - RO (Employee Optional) Record
    - **Positions 122 - 132** — GG (money field; Income from Qualified Equity Grants Under Section 83(i))
    - **Positions 133 - 143** — HH (money field; Aggregate Deferrals Under Section 83(i) Elections as of the Close of the Calendar Year)
  - RU (Total Option) Record
    - **Positions 160 - 174** — GG (money field; Income from Qualified Equity Grants Under Section 83(i))
    - **Positions 175 - 189** — HH (money field; Aggregate Deferrals Under Section 83(i) Elections as of the Close of the Calendar Year)
- Manage W-2s (PRMW2)

  The Manage W-2s screen now allows you to enter, or select from the lookup, the new GG and HH codes in the Code field of the Box 12 subtask.

  The lookup results of Code field now include codes for the USERRA make-up amounts for the 2017 tax year.
- **Print W-2s (PRRW2)** The application now has the ability to print W-2s with the new GG and HH Box 12 codes on the 2018 W-2 form.
- **Print W-2 Summary Report (PRRW2R)**

The application now has the ability to print a W-2 Summary Report with the new GG and HH Box 12 codes.

Affordable Care Act (ACA) Form 1095-C

A specific format for the employee name and covered individuals name is now indicated on the 2018 Form 1095-C. The Print 1095-Cs screen now supports this update and uses the new name format when you print the 1095-C report.

The correct name format is “first name, middle initial, last name” for the following fields:

- Part 1, #1: Name of employee
- Part 3, (a): Name of covered individual(s)

Affordable Care Act Electronic Filing (Tax Year 2018)

For the tax year 2018, the namespaces of the Manifest and Data XML files were updated by replacing "ty2017" with "ty2018", for example, “urn:us:gov:treasury:irs:ext:aca:air:ty18”

Costpoint now supports this update and has the ability to generate XML files that will be valid for 2019 processing year submissions.

State Updates

Georgia G-1003 Electronic Filing

G-1003 is the Withholding Income Statement Transmittal form and the State of Georgia requires this form to be submitted in addition to the W-2 for the W-2 filing. The G-1003 should be submitted using the same option chosen for W-2. Since Costpoint’s W-2 file is applicable for the “Upload a File” method, then Costpoint users who generate W-2s for Georgia must also submit G-1003 through the “Upload a File” method. G-1003 using the “Upload a File” method must be in CSV file format, which is a different format from W-2.

Prior to this release, Costpoint did not create the G-1003 upload file. However, since the G-1003 file is also required when filing W-2s, this will now be automatically generated for Georgia through the Create State W-2 File screen.

Missouri W-2 Electronic Filing

Missouri's W-2 file specifications for EFW2 Format was updated for 2018. Both RE and RS records should now follow same record layout as SSA Publication No. 42-007 EFW2 Tax Year 2018. In addition to this, the RV record has been updated, and RF record is now included in the file.

The Create State W-2 File application was updated to comply with the 2018 W-2 reporting for the State of Missouri.

Oregon W-2 Electronic Filing

Statewide transit tax is now included in the annual filing requirement of Oregon. The Create State W-2 File screen now includes this tax in the RS and RV records of the generated W-2 file for Oregon.

The state transit tax information is in the following positions of the Oregon W-2 file.

- **RS record information**
  - Positions 348-358: Taxable wages for the statewide transit tax.
  - Positions 359-369: Amount withheld for the statewide transit tax.

- **RV record information**
  - Positions 40-54: Total amount of taxable wages for the transit tax.
  - Positions 55-69: Total amount of statewide transit tax withheld.

Pennsylvania W-2 Electronic Filing

The State of Pennsylvania's W-2 file specifications for EFW2 Format was updated for 2018. The following are the changes to the Pennsylvania W-2 file:

- RW, RO, RT, and RU records are not included.
- RV record is now required.
- Individual Taxpayer Identification Numbers (ITIN) will be accepted in the RS record for individuals who do not have a Social Security Number (SSN). However, since SSN is always available, then ITIN will never be used in the file.
- Foreign addresses are now accepted.

The Create State W-2 File screen now complies with the updated W-2 file specifications for the Pennsylvania.

> **Attention:** For more information, please refer to the 2018 W-2 and 1099 Employer Withholding Reporting Instructions and Specifications Handbook: https://www.revenue.pa.gov/GeneralTaxInformation/Tax%20Types%20and%20Information/EmployerWithholding/Documents/2018_w-2_and_1099_reporting_inst_and_specs.pdf

State Tax Updates

> **Note:** This Costpoint release updates Manage State Taxes screen by adding the 2019 state unemployment limit, and by setting to zero the exemption amounts for Married, Single, and Other filing statuses. The allowances have been moved to Manage State Tax Withholding Adjustments application which now contains records for Personal Exemption type for applicable states.

The following are state tax changes effective January 1, 2019:

California

The State of California withholding tables for Method B exact calculations were updated for 2019. To support this change, Costpoint will now use the new tax tables of California in payroll.

The following are the updates to California tax tables:

- The annual standard deduction increases from $4,236 to **$4,401**.
- The low income exemption table has been updated for all filing statuses.
- The withholding tax rate table has been updated for all filing statuses.
- The annual exemption allowance for one increases from $125.40 to **$129.80**.

Colorado

- The unemployment-taxable wage base increases from $12,600 to **$13,100**.

Iowa

- The annual withholding table has been updated.
- The standard deduction increases from $1,650 to **$1,690** a year, for employees who claim one or zero allowances, and from $4,060 to **$4,160** a year, for employees who claim more than one allowance.
- The unemployment-taxable wage base increases from $29,900 to **$30,600**.

> **Note:** For more information, please refer to the *Iowa Individual Income Tax Withholding Formula*: https://tax.iowa.gov/sites/files/idr/documents/IA%20Withholding%20Formula%20and%20Instructions%20TY2019.pdf

Kentucky

The unemployment-taxable wage base increases from $10,200 to **$10,500**.

Missouri

The unemployment-taxable wage base decreases from $12,500 to **$12,000**.

Montana

- The unemployment-taxable wage base increases from $32,000 to $33,000.
- Married and Single exemption amounts have been set to 0.00.

Nevada

The unemployment-taxable wage base increases from $30,500 to **$31,200**.

North Carolina

The unemployment-taxable wage base increases from $23,500 to **$24,300**.

Oklahoma

- Married and Single exemption amounts have been set to **0.00**.
- The unemployment-taxable wage base increases from $17,600 to **$18,100**.

Vermont

- Married and Single exemption amounts have been set to **0.00**.
- The unemployment-taxable wage base decreases from $17,600 to **$15,600**.

Washington

The unemployment-taxable wage base increases from $47,300 to **$49,800**.

Wyoming

The unemployment-taxable wage base increases from $24,700 to **$25,400**.

Known Issues

This section includes summaries of the issues that exist in this Costpoint release. These issues will be resolved in future releases.

Print 1095-Cs (HBR1095C)

Deltek Defect Tracking Number: 1040284

Description: The application truncates the employee's first and/or last name on the printed Form 1095-C if the first and/or last name exceed 10 characters.

Customers Impacted: This defect affects Costpoint users who print the 1095-C report for Affordable Care Act (ACA) compliance.

Workaround Before Fix: None.

Additional Notes: None.

Deltek Defect Tracking Number: 1040644

Description: The 1095-C report does not fit in preprinted forms if you are printing from an Edge browser.

Customers Impacted: This defect affects Costpoint users who print the 1095-C report from a Windows 10 Edge browser.

Workaround Before Fix: Print the report using Adobe Acrobat Reader DC or Google Chrome browser.

Additional Notes: None.

Deltek Defect Tracking Number: 1040631

Description: When you select portrait orientation for printing the report, the first and last name columns on the printed 1095-C does not support employees with three first names and/or three last names. The third first/last name does not display properly in the corresponding column.

Customers Impacted: This defect affects Costpoint users who print the 1095-C report for Affordable Care Act (ACA) compliance.

Workaround Before Fix: None.

Additional Notes: None.

2019 W-4 Information in Employee Self Service

To match the information from the 2019 Form W-4, this Costpoint release updates the Child Tax Credit, Credit for Other Dependents, and Other Credits information on the Allowances Worksheet of the Federal Withholding screen (ESMFEDWH) and Federal Withholding tab of the Life Events/New Hires screen (ESMLIFEEVENT).

The following are the updated sections in the Allowances Worksheet:

- 2) Child tax credit:

  If your total income will be less than $71,201 ($103,351 if married filing jointly), enter “4” for each eligible child.

  If your total income will be from $71,201 to $179,050 ($103,351 to $345,850 if married filing jointly), enter “2” for each eligible child.

If your total income will be from $179,051 to $200,000 ($345,851 to $400,000 if married filing jointly), enter “1” for each eligible child.

If your total income will be higher than $200,000 ($400,000 if married filing jointly), enter “0”.

- 3) Credit for other dependents:

  If your total income will be less than $71,201 ($103,351 if married filing jointly), enter “1” for each eligible dependent.

  If your total income will be from $71,201 to $179,050 ($103,351 to $345,850 if married filing jointly), enter “1” for every two dependents (for example, “0” for one dependent, “1” if you have two or three dependents, and “2” if you have four dependents).

  If your total income will be higher than $179,050 ($345,850 if married filing jointly), enter “0”.

- 4) Other credits:

  If you have other credits, see Worksheet 1-6 of Pub. 505 and enter the amount from that worksheet here. If you use Worksheet 1-6, enter “0”.

> **Attention:** For more information, please refer to the 2019 Form W-4: https://www.irs.gov/pub/irs-pdf/fw4.pdf.

System Requirements

This enhancement requires Costpoint 7.1.1 Common Lib - BENEFITSLIB (cp711_cmnlib_BENEFITSLIB_010.zip).

Materials Management

Supplier Portal: Phase 1

The Supplier Portal is a new feature within Costpoint that will allow suppliers to quickly access purchase orders (PO) issued by buyers. This will also help companies to streamline communications between their purchasing departments and their suppliers, vendors, and subcontractors. The portal will be designed and developed in the following phases:

- Post-Award Management
- Invoice Management
- Pre-Award Management

For the first phase of the feature, suppliers and buyers can use the portal to communicate, attach documents, and enable email notifications to alert them when actions are needed to be done in the portal. The supplier portal will have dashparts that will give suppliers and buyers a view of purchase orders (PO) that require actions, as well as upcoming, late, or cancelled orders.

Costpoint customers need to have a license for the new Supplier Portal module to enable this feature. Once the feature is enabled, Costpoint prime customers need to provide their suppliers rights to access the Supplier Portal on the Manage Users (SYMUSR) screen.

Patch and System JAR Requirements

These enhancements require the following:

- Costpoint 7.1.1 System JAR 048 (cp711_sys_048.zip)
- PATCH3503
- PATCH3523
- PATCH5124
- PATCH5126
- PATCH7154

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application Name	Application ID	Application File
Materials	SP	Supplier Portal Dashboard	SPDSP	cp711_spdsp_002.zip
Materials	SP	Manage Supplier Actions	SPMSPACT	cp711_spmspact_002.zip
Administration	SY	Setup Company	SYPCOMP	cp711_sypcomp_024.zip
Administration	SY	Manage Users	SYMUSR	cp711_symusr_017.zip
Materials	MM	Manage Purchase Orders	POMMAIN	cp711_pommain_042.zip
Materials	MM	Configure Purchasing Settings	POMSET	cp711_pomset_007.zip
Materials	MM	Manage Buyers	POMBUY	cp711_pombuy_007.zip
Materials	MM	Expedite Purchase Orders	POMEXPD	cp711_pomexpd_013.zip
Materials	MM	Create Blanket Purchase Order Releases	POMRELS	cp711_pomrels_024.zip
Materials	MM	View Purchase Orders	POQSTAT	cp711_poqstat_017.zip
Materials	MM	View Purchase Order Change Orders	POQCHNG	cp711_poqchng_009.zip
Materials	MM	Create Purchase Order Change Orders	POMCHNG	cp711_pomchng_016.zip
Materials	MM	Archive Purchase Orders	POPARCH	cp711_poparch_014.zip

Administration Domain

This section includes summaries of the changes made in relation with the Supplier Portal Phase I feature within the Costpoint Administration domain.

Manage Users (SYMUSR)

This application has two new fields:

- Supplier Portal Vendor: Use this field to indicate the supplier portal vendor ID linked to the user ID for a corresponding company.
- Supplier Portal Vendor Name: This field indicates the supplier portal vendor name corresponding to the vendor ID linked to the user ID for a corresponding company.

You can use these new fields to retrieve the appropriate purchase orders (PO) when loading the Supplier Portal dashboard (SPDSP) application.

These fields are visible only to users who are licensed for Supplier Portal.

Set Up Company (SYPCOMP)

This application copies the values of the new check boxes on the Configure Purchasing Settings screen, **Email Notification** and **Allow Edit** in the **Supplier Portal** group box, from the original company when you create a new company from an existing company.

View Help About (SYMABOUT)

The Features subtask of the View Help About (SYMABOUT) screen now includes this feature.

Materials Domain

This section includes summaries of the changes made in relation with the Supplier Portal Phase I feature within the Costpoint Materials domain.

Supplier Portal Dashboard (SPDSP)

This is a new application (**Materials » Supplier Portal » Dashboards/Actions » Supplier Portal Dashboard**) that suppliers can use to see a snapshot of and/or update information regarding their purchase orders (PO).

Suppliers can access the portal via the Costpoint login screen. Costpoint prime customer will provide them with login credentials such as a user ID tied to a vendor ID, which in turn, is tied to applicable POs. This screen is under the new Supplier Portal module of the Materials domain and requires a license to access it.

> **Note:** Supplier Portal users do not have to have Costpoint installed.

Upon login, suppliers will see the dashboard screen with information for the following five (5) dashparts:

- Pending Supplier Action (across Purchase Orders): Costpoint automatically populates this dashpart with bars that indicate the number of PO lines (across multiple POs) in states that need supplier action. You can click the bar hyperlink to go to the Manage Supplier Actions (SPMSPACT) screen where the corresponding PO/PO lines are loaded. You can select whether to display or hide any of the bars on the dashpart.
- Past Due Deliveries: Costpoint automatically populates this dashpart with bars that indicate the number of days that the supplier is late in fulfilling the PO line order. You can click the bar hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded. By default, the ranges for this dashpart have been set to increments of 10 (for example, 10, 20, and 30, respectively, for ranges 1–3). You can set the ranges by clicking **Parameters** from the breadcrumb trail (**Materials » Supplier Portal » Dashboards/Actions » Supplier Portal Dashboard » Parameters » Reports**) and define up to 10 ranges for this dashpart.

Costpoint will only display those that have been defined, and you have an option to hide this dashpart.

- Upcoming Deliveries: Costpoint automatically populates this dashpart with bars that indicate upcoming deliveries so that the supplier can take the necessary actions to ensure on-time delivery. You can click the bar hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded. By default, the ranges for this dashpart have been set to increments of 5, 10, and 20, respectively, for ranges 1–3. You can set the ranges by clicking Parameters from the breadcrumb trail (**Materials » Supplier Portal » Dashboards/Actions » Supplier Portal Dashboard » Parameters » Reports**) and define up to 10 ranges for this dashpart. Costpoint will only display those that have been defined, and you have an option to hide this dashpart.
- Pending Supplier Action (by Purchase Order): This dashpart displays a list of POs that have at least one (1) PO line or delivery schedule line with pending supplier action. You can click the PO hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded for the selected PO.
- Open Purchase Order: This dashpart displays a list of POs that have at least one open PO line, regardless of the **Last Action** value. You can click the PO hyperlink to go to the Manage Supplier Actions screen, where the corresponding PO/PO lines are loaded for the selected PO.

The list of POs included in the dashparts is based on the following query conditions:

- PO company matches that of the logged-in user.
- PO supplier ID matches that of the logged-in user.
- PO line/delivery line action is not blank and based on current Action.
- PO line status is Open.
- (New Orders) PO header Released Date ≤ Current Date.

From the dashboard, suppliers can click the hyperlink to go to the particular PO/line/delivery schedule line, and take the necessary action on the Manage Supplier Actions (SPMSPACT) screen.

Suppliers can also add notes, via this portal, to save communications with the buyer.

Manage Supplier Actions (SPMSPACT)

This is a new application (**Materials » Supplier Portal » Dashboards/Actions » Manage Supplier Actions**) that suppliers will be automatically taken to when they click the Supplier Portal dashboard bars. This screen is under the new Supplier Portal module of the Materials domain and requires a license to access it.

- Pending Supplier Action (across Purchase Orders)
  - New Orders: If you click the **New Orders** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If a delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
  - Change Requests: If you click the **Change Requests** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along

with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

- Change Request Rejected: If you click the **Change Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- Cancel Request: If you click the **Cancel Request bar** on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- Cancel Request Rejected: If you click the **Cancel Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- Backorder Request Accepted: If you click the **Backorder Request Accepted** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions (across multiple POs). This means that the buyer has accepted the request for a PO line or delivery schedule line to be put on backorder due to fulfillment issues. This is for information purposes only.
- Backorder Request Rejected: If you click the **Backorder Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions (across multiple POs). This means that the buyer has rejected the request for a PO line or delivery schedule line to be put on backorder due to fulfillment issues. The supplier must review and either acknowledge the rejection, or take further action.
- Substitution Request Accepted: If you click the **Substitution Request Accepted** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions (across multiple POs). This means that the buyer has accepted the request made by the vendor to supply a different part as a replacement for the original PO line part. The supplier can then ship the part agreed.

    - Substitution Request Rejected: If you click the **Substitution Request Rejected** bar on the Supplier Portal dashboard, Costpoint loads all PO lines or delivery schedule lines that meet the set query conditions (across multiple POs). This means that the buyer has rejected the request made by the vendor to supply a different part as a replacement for the original PO line part. The supplier must review and either acknowledge the rejection, or take further action.
- Pending Supplier Action (by Purchase Order): If this screen is opened by selecting a row from the list of POs in the Pending Suppliers Action (by Purchase Order) dashboard option, Costpoint loads all PO lines for the selected PO having one of the following actions:
    - Backorder Request Accepted by Buyer
    - Backorder Request Rejected by Buyer
    - Cancel Request by Buyer
    - Cancel Request Rejected by Buyer
    - Change Request by Buyer
    - Change Request Rejected by Buyer
    - Substitution Request Accepted by Buyer
    - Substitution Request Rejected by Buyer
    - Pending Supplier Acknowledgment
    - Updated by Buyer
    - Change Order – Pending Supplier Acknowledgment

Note: The **Change Order – Pending Supplier Acknowledgment** action is not available in the drop-down list. The system automatically inserts this action when the buyer implements the changes via the **Implement Action Changes** button at the PO header level, after first manually creating a change order.

This is also automatically inserted by the system when the buyer manually creates a change order (via the Create Purchase Order Change Orders screen) and manually updates the order quantity/amount or due date on a PO line or delivery schedule. This only applies to those PO lines (or delivery schedule lines) that have been modified after creating the change order.

Note: The **Updated by Buyer** action is not available in the drop-down list. The system automatically inserts this action when the buyer implements the changes via the **Implement Action Changes** button at the PO header level, without first manually creating a change order.

This is also automatically inserted by the system when the buyer manually changes the order quantity, amount, or due date on a PO line or delivery schedule without first creating a change order.

If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line along with quantities and due dates from the delivery schedule. If a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

- Past Due Deliveries: This screen opens to the default settings discussed below. For more information on customizing the ranges, please see dashparts information as discussed on the Supplier Portal Dashboard section.

- If this screen is opened by selecting ≤ 10 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, [Current Date - Due Date] ≤ 10 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- If this screen is opened by selecting 12–20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, 10 < [Current Date - Due Date] ≤ 20 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the New Action changes will apply to the PO line.
- If this screen is opened by selecting > 20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, 20 < [Current Date - Due Date] ≤ 30 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- If this screen is opened by selecting > 30 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, [Current Date - Due Date] > 30 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Note**s. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

- Upcoming Deliveries: This screen opens to the default settings discussed below. For more information on customizing the ranges, please see dashparts information as discussed on the Supplier Portal Dashboard section.
  - ≤ 5 Days: If this screen is opened by selecting ≤ 5 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, [Due Date - Current Date] ≤ 5 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and

due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

    - 6–10 Days: If this screen is opened by selecting 6–10 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, 6 < [Due Date - Current Date] ≤ 10 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
    - 11–20 Days: If this screen is opened by selecting 11–20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, 10 < [Due Date - Current Date] ≤ 20 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
    - > 20 Days: If this screen is opened by selecting >20 bar on the dashboard, Costpoint loads all PO lines that match the company and supplier ID with that of the logged-in user, [Due Date - Current Date] >20 days, and PO line status = Open. PO lines with Action = blank are excluded. The user can modify the number of days on this dashpart. If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line, along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.
- Open Purchase Orders: If this screen is opened by selecting a row from the list of POs in the Open Purchase Orders dashboard option, Costpoint loads all PO lines with an open quantity and an order quantity greater than zero (0) for the selected PO, regardless of action.

  If the PO line has zero order quantity, Costpoint loads the PO line with greater than zero (0) open amount.

  If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line along with quantities and due dates from the delivery schedule.

  If the PO line has a delivery schedule, Costpoint loads multiple lines for each PO line along with quantities and due dates from the delivery schedule. Fields are non-editable except for the following conditional fields: **New Action**, **Proposed Order Qty**, **Proposed Amt**, **Proposed Due Date**, and **Notes**. Changes to any of the editable fields are automatically reflected on the Action History table upon save. In addition, if a delivery schedule exists, the **New Action** changes will apply to the delivery schedule line instead of the PO line. If delivery schedule does not exist, then the **New Action** changes will apply to the PO line.

- Email Alerts: If a buyer selected the **Supplier Portal Email Notification** check box on the Manage Purchase Orders screen, Costpoint automatically generates an email notification to the buyer. Email notifications are sent to the email address associated with the PO header buyer's employee ID (this email address is the same email address saved on the Manage Employee Information screen) whenever a supplier saves a new action information on the PO line or delivery schedule line. If a supplier changed and saved multiple POs with the same buyer, PO, or delivery lines, Costpoint sends one (1) email per PO. The same is true for multiple POs with different buyers. Included in the email notification is the link to the PO that takes the buyer directly to the Manage Buyer Actions screen to automatically query the referenced PO.
- The Action History subtask shows the history of any action change along with the communication notes. Costpoint displays all rows associated with the particular PO, release, and PO/delivery line regardless of the change order number. Information in this section based on the changes made to the Action Information tab on the Manage Purchase Orders screen.

Costpoint only uploads POs with vendor IDs that match the vendor ID on the company into which the user is logged into.

The following action options are available to suppliers:

- Acknowledged by Supplier: This option indicates that the PO line order quantity/amount and due date are acceptable.
- Change Request by Supplier: This option indicates that there is a proposed change to the PO line quantity/amount or due dates.
- Change Request Accepted by Supplier: This option indicates that the supplier has accepted the change proposed by the buyer regarding the PO line quantity/amount or due dates.
- Change Request Rejected by Supplier: This option indicates that the supplier has rejected the change proposed by the buyer regarding the PO line quantity/amount or due dates.
- Cancel Request by Supplier: This option indicates that the supplier has requested a PO line order cancellation.
- Cancel Request Accepted by Supplier: This option indicates that the supplier has accepted a PO line order cancellation request made by the buyer.
- Cancel Request Rejected by Supplier: This option indicates that the supplier has rejected a PO line order cancellation request made by the buyer.
- Backorder Request by Supplier: This option indicates that the supplier has requested a backorder for a PO line order due to fulfillment issues.
- Substitution Request by Supplier: This option indicates that the supplier has requested permission to substitute a different part other than what was on the PO line.

Manage Purchase Orders (POMMAIN)

The following are the changes to this screen:

- This screen now has the **Implement Action Changes** button to implement changes proposed through the supplier portal. This button is visible only to users who are licensed for Supplier Portal.
    - Clicking this button, without creating a new change order, updates all qualified PO and delivery schedule lines with the latest proposed quantity, amount, and due date. The updates are reflected in the **Action** field as **Updated by Buyer**, and the supplier can then acknowledge the updates, if necessary.

- Depending on the company's system, if a change order is needed before implementing action changes, the buyer creates a change order on the Create Purchase Order Change Orders screen, and before clicking **Implement Action Changes** by querying the PO on the Manage Purchase Orders screen. This action updates all PO and delivery schedule lines with the latest proposed quantity, amount, and due date. The updates are reflected in the **Action** field as **Change Order – Pending Supplier Acknowledgment**, and the supplier can then acknowledge the updates.
- The buyer can also manually make the changes to the PO or delivery schedule lines as per usual. The updates are reflected in the **Action** field as **Updated by Buyer**, and the supplier can then acknowledge the updates.

- If you create a new release order by clicking the **Create Blanket PO Release**, the Action Information tab will behave similar to the logic of dealing with a new PO.
- If the user is licensed for Supplier Portal, and the **Released to Vendor** check box is selected:
  - All PO lines and associated delivery schedule lines (if any) are accessible in the portal.
  - All PO lines that currently have blank values in the **Last Action** field are loaded with **New Action** = **Pending Supplier Acknowledgment**. Delivery schedules associated with the PO line and with a blank **New Action** field will also be updated with the **New Action** value.
  - Additional PO lines will have **Pending Supplier Acknowledgment** as **New Action** default.
  - Additional delivery schedule row will have **Pending Supplier Acknowledgment** as **New Action** default.
- If the user is licensed for Supplier Portal, and the **Released to Vendor** check box is not selected:
  - The **New Action** field is enabled for PO lines with associated delivery schedule rows and if the current value of the PO line **Last Action** is blank. The **New Action** field is disabled for the associated delivery schedule rows of the PO line.

    > **Note:** The PO line **New Action** field is always enabled if there are no delivery schedule lines associated with the PO line.

  - Manually releasing a PO line to the supplier by changing the **New Action** from blank to **Pending Supplier Acknowledgment**, automatically, releases as well all associated delivery schedule rows for the PO line.
  - An additional PO line will have a blank **New Action** field, and the buyer has the option to release the PO line (together with any associated new delivery schedule lines with a disabled **New Action** field) to the supplier by selecting **New Action** = **Pending Supplier Acknowledgment**.
  - An additional delivery schedule row for a previously released PO line will have **New Action** = **Pending Supplier Acknowledgment**. An additional delivery schedule row for an unreleased PO line will have a disabled **New Action** field.
- This screen has a new Email Address field to store the email address of the contact to whom supplier portal-related alerts will be sent.
- This screen has a new **Supplier Portal Email Notification** check box for sending email alerts to the supplier whenever there are portal information changes made by the buyer. This check box initially defaults its value from the **Supplier Portal Email Notification** check box associated with the PO header buyer. If the **Allow Edit** check box is selected on the Configure Purchasing Settings screen, then the **Supplier Portal Email Notification** check box on the PO header is editable; otherwise, **Supplier Portal Email Notification** is disabled. If the **Supplier Portal Email Notification** check box is not selected, the supplier will not receive email alerts.

This option is only available to users who are licensed for Supplier Portal.

- This screen has a new Action Information tab (PO line and Delivery Schedule subtask) with fields that can be updated by the buyer and allow faster communication with the supplier.
  - Changes made on this tab are saved in the Action History subtask and made available to suppliers in the Supplier Portal where suppliers can then take the necessary action. The last action taken and the most recent proposed changes are reflected on the PO line (PO/Rlse/PO line/delivery schedule line).

    This option is only available to users who are licensed for Supplier Portal.
- On the **New Action** field drop-down list, the buyer can select standard actions to take in relation to the supplier portal. In addition, the buyer can enter proposed changes in quantity, amount, or due dates, along with notes entered.
- This screen has a new Action History subtask linked to the PO line/delivery schedule to access action history information for the PO/rlse/PO line/delivery schedule line. This option is only available to users who are licensed for Supplier Portal.

Configure Purchasing Settings (POMSET)

This screen has a new **Supplier Portal** group box, with **Email Notification** and **Allow Edit** check boxes, which can be used to enable sending of email alerts between the supplier and the buyer whenever there are action changes related to the POs in the supplier portal. The value of the **Email Notification** check box from this screen is reflected on new buyers created on the Manage Buyers screen. The value of the **Allow Edit** check box from this screen indicates whether the supplier portal email notification is editable or non-editable on the Manage Buyers and Manage Purchase Orders screens.

These fields are visible only to users who are licensed for Supplier Portal.

Manage Buyers (POMBUY)

This screen has a new **Supplier Portal** group box with an **Email Notification** check box. The value of this check box initially defaults to the **Email Notification** check box on the Configure Purchasing Settings screen, and this applies to new POs and buyers. If the **Allow Edit** check box is selected on the Configure Purchasing Settings screen, then the **Email Notification** check box is editable; otherwise, **Email Notification** is disabled.

This field is visible only to users who are licensed for Supplier Portal.

Create Blanket Purchase Order Releases (POMRELS)

The child table window and the Delivery Schedule subtask now have the Action Information tab to indicate that the release line is ready for the supplier to view. The tab has two fields, **Action** and **Notes**. For a new release where the line is not yet ready for the supplier, the **Action** field defaults to blank. The buyer can later change this to **Pending Supplier Acknowledgment** when it is ready. If the buyer leaves the **Action** field blank, this can be changed on the Manage Purchase Orders or on the Expedite Purchase Orders screen. In the **Notes** field, the buyer can enter any free-form text to communicate to the supplier.

You can review and access all changes you make on this tab through the Action History subtask on the PO line and Delivery Schedule subtask across Costpoint.

Expedite Purchase Orders (POMEXPD)

The following are the changes to this screen:

- This screen has a new Action Information tab (PO line and Delivery Schedule subtask) with fields that can be updated by the buyer and allow faster communication with the supplier.

    - Changes made on this tab are saved in the Action History subtask and made available to suppliers in the Supplier Portal where suppliers can then take the necessary action. The last action taken and the most recent proposed changes are reflected the PO line (PO/Rlse/PO line/delivery schedule line). This option is only available if you are licensed for Supplier Portal.
    - On the **New Action** field drop-down list, the buyer can select standard actions to take in relation to the supplier portal. In addition, the buyer can enter proposed changes in quantity, amount, or due dates, along with notes entered.
- This screen has a new Action History subtask to allow access to the action history information for the PO/Rlse/PO line/delivery schedule line.

Create Purchase Order Change Orders (POMCHNG)

This application now copies supplier portal-related information to the history table whenever a change order is created, and the screen option to Save Existing Change Order to History File is selected.

View Purchase Order Status (POQSTAT)

This screen has a new Action History subtask that shows the history of any action change along with the communication notes. Costpoint displays all rows associated with the particular PO, release, and PO/delivery line regardless of the change order number. The information in this section is based on the changes made to the Action Information tab of the Manage Purchase Orders screen.

View Purchase Order Change Orders (POQCHNG)

This screen has several new Action History subtasks that allow access to the action history information associated with the current or old change order for the PO/Rlse/PO line/delivery schedule line on the following:

- Current CO Line
- Old CO Line
- Current CO Line/Delivery Schedule
- Old CO Line/Delivery Schedule
- Compare Cos (Current CO Line)
- Compare Cos (Old CO Line)
- Compare Cos (Current CO Line/Delivery Schedule)
- Compare Cos (Old CO Line/Delivery Schedule)

Note: The Action History subtask is visible only to users who are licensed for Supplier Portal.

Archive Purchase Orders (POPARCH)

This screen has a new **PO Line Action History** check box to copy the action history information of the PO lines to the corresponding tables.

Administration

Workflow Approval Role Filtering

To ensure compliance with company policies, configure role filtering conditions that limit approvals to certain users for a role. Role filtering ensures that the correct approver is notified to review and approve certain records. Role filtering conditions are based on data values of the approval entity and are evaluated when the workflow is running. Build the conditions with fields you define in the new **Role Filter Fields (WFMARF)** application. If multiple condition lines are defined, the AND operation is assumed to connect the statements.

For example, you can set role filtering conditions for Role Name ‘Approval’ that specifies Role User 1 can approve invoices under $50k and Role User 2 can approve invoices over $50k.

The process to use role filtering involves:

- Creating fields for role filtering (**Admin » Workflow » Approval Workflow (NEW) » Role Filter Fields**).
- Applying role filtering condition statements to role users (**Admin » Workflow » Approval Workflow (NEW) » Role Users » Role Filtering Conditions**).
- Creating an Entity Field Name and mapping it to the new Matched Role Filter Field (**Admin » Workflow » Approval Workflow (NEW) » Approval Entity Fields**).
- Assigning the Entity Key Field Name to the appropriate approval screen field ID (**Admin » Workflow » Approval Workflow (NEW) » Application Screens » Approval Screen Fields**)

System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711_sys_048.zip
- cp711_wfmarf_001.zip
- cp711_wfmarole_003.zip

Select Specific Role Group User for Approval

The approval workflow has been enhanced to enable the workflow initiator to select a specific user to receive the approval notification. Previously, every user in the user role group received an approval notification. Each approver throughout the workflow process can select the approvers for the next approval role step.

Access this feature in the new Approval Roles Users subtask in the Approval screen within the record.

System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711_sys_048.zip

- cp711_wfmapprl_013.zip

File Attachments in Workflow Approval Email Notifications

If you are licensed to use Content Management Integration (CMI), you can enable a workflow to send associated documents, that are attached to a record via CMI, with an email for approval. This enhancement enables approvers to view the documents related to the approval record.

To activate this option for a workflow, select the **Include File Attachment in Email Notification** option in the Application Screens subtask on the Approval Workflow Models (WFMAPPL) screen. When the workflow is started, associated documents are attached to each approval in the workflow process.

System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711_sys_048.zip
- cp711_wfmapprl_013.zip

Workflow Approval Notification Only Steps

You can now create a workflow that only includes a notification step that does not require any further action. The notification step can be a part of a larger workflow process or used as a standalone model.

In the Approval Steps subtask in the Approval Workflow Models screen, select the **Notify** node type to send a notification message to a role. Use **Edit Node** to define the specific message text and the role recipient, for the Notify node.

When the workflow is triggered, the role will receive a notification email, the step will be considered completed, and the workflow will move to the next level or to the Finish step.

System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711_sys_048.zip
- cp711_wfmapprl_013.zip
- cp711_wfatodo_006.zip

Reject Back to Specific Step in Workflow

As an approver, you now have the option to reject a workflow back to a specific step. In the **Approval** window, the new **Back to** field, in the Reject section on the **Approve or Reject** tab, enables you to reject back to a previous step in the workflow. You can also choose to reject the complete workflow.

You can only reject a specific step if a workflow model has not been approved. The only option available, at that point, is Reject All on the Reject WF tab in the Approval window.

System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711_sys_048.zip
- cp711_wfmapprl_013.zip

Workflow Approval Group/Role Completion Notifications

After an approver approves or rejects a workflow step, Costpoint will automatically send an email notification to other users in the Approval Role or Group set. This enhancement alerts the other users that the step has been completed and no further action is required.

System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711_sys_048.zip
- cp711_wfmapprl_013.zip

Enable SSN Suppression by Default in Manage Users

This Costpoint release updates the Manage Users screen so that the **Suppress SSN** check box will be selected by default for new users. If the **Suppress SSN** check box was selected for a Costpoint user, the Social Security Number (SSN) will be suppressed, for this particular user, on certain screens and certain printed reports where the number is normally displayed or printed. The screens and reports will display blanks instead of the number.

> **Note:** The Suppress SSN check box does not affect all screens and reports because you can use organization security to limit user rights and because certain government tax reports require the SSN.

System Requirements

This enhancement requires Costpoint 7.1.1 System JAR 048.

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
Admin	Security	SYMUSR	Manage Users	cp711_symusr_017.zip

Enhanced Workflow Approval Email Messaging

The Approval Email Messaging (WFMAEMAIL) application, used to define text templates for email notifications, has been redesigned so that you can create unique messages and details for each notification in your workflow. This screen now includes tabs with text templates for each notification type. The following new tabs are available on the Approval Email Messaging screen:

- Assigned
- Additional Time
- Escalated
- Delegated
- Approved
- Rejected
- WF Completed
- WF Rejected

System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711_sys_048.zip
- cp711_wfmaemail_005.zip

Mass Update Suppression Settings in Manage Users

This Costpoint release provides a new application, Manage User Suppression (SYMUSRSUP), where you can update the suppression settings of existing users from the Manage Users screen. The settings include the following check boxes:

- Suppress Labor
- Suppress SSN
- Suppress Cost
- Suppress Price

Use the Manage User Suppression screen as an alternative to updating the suppression settings on the Manage Users screen. You can manually select the suppression check boxes of users, or you can use the buttons on this screen to mass update the suppression settings of multiple users all at the same time. To access the new application, go to Costpoint **Admin » Security » System Security**.

> **Warning:** Access to this new screen should be limited to users that have the authority to dictate user-access to sensitive information.

System Requirements

This enhancement requires Costpoint 7.1.1 System JAR 047.

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
Admin	Security	SYMUSRSUP	Manage User Suppression	cp711_symusrsup_001.zip

Reports & Analytics

Role-Based Dashboards: Limitation on the Number of Dashparts Displayed

The number of dashparts that display on the Dashboard Reports tab depends on the number of dashparts you have open on the Parameters tab and your screen resolution. For example, if your screen resolution is lower than 1680 pixels, not all eight dashparts opened on the Parameters tab will be displayed on the Reports tab.

As a workaround, you can do any of the following:

- Toggle between the Parameters and Reports tabs to add (open) and remove (close) dashparts that you want to view.
- Drag the dashpart table windows up or down on the Parameters tab to rearrange the dashparts. Costpoint displays the dashparts on the Reports tab in the order that they appear on the Parameters tab, first to last.
- Set your screen resolution to 1920 pixels, which is the recommended resolution to view all dashparts. Note, however, that if your screen does not support 1920 pixels, you will not be able to set that resolution.

Costpoint Integration

There are no changes to Costpoint Integration in this release.

Budgeting and Planning

Display Variances in Favor of Budget or Actuals

Budgeting & Planning was enhanced to allow the option of displaying variances in favor of either budget or actuals.

Prior to this enhancement, variances always displayed in favor of actuals, and Budgeting & Planning calculated the variance for cost, revenue, and profit by subtracting budget from actuals, so if each was less than the budgeted amount, all three displayed a negative variance.

As part of this enhancement, the calculation method was also updated so that whether favoring budget or actuals, the variance calculation for revenue and profit is the opposite of the cost calculation, which is explained in the section below.

Because the variance calculation for revenue and profit is now always opposite to the cost calculation, and you can also control whether variances display in favor of either budgets or actuals, Budgeting & Planning now affords you greater flexibility in variance reporting.

Configure Variance Reporting

To support the new functionality, a **Report Variance Calculation in Favor of** setting was added to the Display tab of **Planning » Administration » Administration Controls » Configuration Settings (MAM10)**. Options include:

- **Actuals** – This is the default option. If you wish to display variances in favor of actual costs, no action is required. When this option is selected and actual costs are higher than budgeted costs, the variance displays as a negative.

  For example, $1,000.00 (actual material costs) - $800.00 (budgeted materials cost) = ($200.00).

- **Budget** – Select this option if you wish to display variances in favor of budgeted costs. When this option is selected and actual costs are higher than budgeted costs, the variance displays as a positive.

  For example, $1,000.00 (actual material costs) - $800.00 (budgeted materials cost) = $200.00.

Revenue and Profit Variances

For either configuration option (**Actuals** or **Budget**), the variance calculation for revenue and profit is now opposite to the cost calculation.

For example, if actuals are favored and total revenue is 300,000 and budgeted revenue was 200,000, the 100,000 variance will display as a positive. If budget is favored, it will display a negative.

Reports Affected by the Variance Calculation

The following is a list of Project Budgeting reports that have been updated for this enhancement, when **Variance** is selected as the Report Type. For a few reports, only certain columns display variances, which is also noted below.

Top Level Reports

- Direct Project Cost Categories (CPT1, BPT1, PPT1)
- Direct Project Cost (CPT3, BPT3, PPT3)
- Labor Hours Analysis (CPT5, BPT5, PPT5)

- Labor Cost Analysis (CPT6, BPT6, PPT6)
- Budget/EAC Status (APT1). For this report, only the Unplanned and Planned columns employ variance calculations.

Level Down Reports

- Project Cost Categories (CPL1, BPL1, PPL1) Project Cost (CPL2, BPL2, PPL2)

Active Level Reports

- Hours Breakdown (CPA1, BPA1, PPA1)
- Raw Cost Breakdown (CPA2, BPA2, PPA2)
- Burdened Cost Breakdown (CPA3, BPA3, PPA3)
- All Cost Breakdown (CPA4, BPA4, PPA4)
- Project Cost Chart (CPA8, BPA8, PPA8)
- T&M Labor Analysis (CPA10, BPA10, PPA10)
- Current Forecast (BPA16). For this report, only the Forecast Variance column is affected.

Supplemental Reports

- Project Budgets/EACs Status (APS1, APS3). For this report, only the Unplanned and Planned columns are affected.
- Project Status (SPA5). For this report, only the Variance column is affected.

- ## Requirements
- cp711_bnp_common_015.zip
- ## Application Jar Requirements
- The following table shows the required file for the screen affected by this update:

Module » Application Group	Application ID	Application Name	Required File
Administration » Admin Controls	BNP_BAMMAM10	Configuration Settings (MAM10)	cp711_bp_bnp_bammam10_012.zip
Project Budgeting » Reports/Inquiries » Top Level Reports	BNP_CAQXPT1	Direct Project Cost Categories (CPT1, BPT1, PPT1)	cp711_bp_bnp_caqxpt1_003.zip
	BNP_CAQXPT3	Direct Project Cost (CPT3, BPT3, PPT3)	cp711_bp_bnp_caqxpt3_002.zip
	BNP_CAQXPT5	Labor Hours Analysis (CPT5, BPT5, PPT5)	cp711_bp_bnp_caqxpt5_001.zip
	BNP_CAQXPT6	Labor Cost Analysis (CPT6, BPT6, PPT6	cp711_bp_bnp_caqxpt6_001.zip
	BNP_OAQAPT1	Budget/EAC Status (APT1)	cp711_bp_bnp_oaqapt1_002.zip

Module » Application Group	Application ID	Application Name	Required File
Project Budgeting » Reports/Inquiries » Level Down Reports	BNP_CAQXPL1	Project Cost Categories (CPL1, BPL1, PPL1)	cp711_bp_bnp_caqxpt1_003.zip
	BNP_CAQXPL2	Project Cost (CPL2, BPL2, PPL2)	cp711_bp_bnp_caqxpt3_002.zip
Project Budgeting » Reports/Inquiries » Active Level Reports	BNP_CAQXPA1	Hours Breakdown (CPA1, BPA1, PPA1)	cp711_bp_bnp_caqxpa1_002.zip
	BNP_CAQXPA2	Raw Cost Breakdown (CPA2, BPA2, PPA2)	cp711_bp_bnp_caqxpa2_002.zip
	BNP_CAQXPA3	Burdened Cost Breakdown (CPA3, BPA3, PPA3)	cp711_bp_bnp_caqxpt1_003.zip
	BNP_CAQXPA4	All Cost Breakdown (CPA4, BPA4, PPA4)	cp711_bp_bnp_caqxpa4_002.zip
	BNP_CAQXPA8	Project Cost Chart (CPA8, BPA8, PPA8)	cp711_bp_bnp_caqxpa8_004.zip
	BNP_BGQBPA10	T&M Labor Analysis (CPA10, BPA10, PPA10)	cp711_bp_bnp_caqxpa10_004.zip
	BNP_BGQBPA16	Current Forecast (BPA16)	cp711_bp_bnp_bgqbpa16_004.zip
Project Budgeting » Reports/Inquiries » Supplemental Reports	BNP_OAQAPSX	Project Budgets/EACs Status (APS1, APS3)	cp711_bp_bnp_oaqapsx_003.zip
	BNP_SRQSPA5	Project Status (SPA5)	cp711_bp_srqspa5_006.zip

Time and Expense

Time

Manage/Approve Timesheet Search Period Default Values

When you filter by Status and select a timesheet schedule in **Time » Timesheets » Manage/Approve Timesheets**, the Year and Period fields now default to the current year and period, as based on what is configured for that schedule in the Manage Timesheet Schedule screen.

Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
TE	Time	TMMTIMESHEET_APPROVE	Manage/Approve Timesheets	cp711_te_tmmtimesheet_approve_017.zip

Expense

There are no updates in this area.

Configuration

There are no updates in this area.

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