Deltek Costpoint Hot Fix Readme

Release Date: August 23, 2018

Costpoint Team Management Phase II

This Costpoint Team Management module enhancement moves the Team Management setting from the Configure Personnel Settings screen to a new application, Configure Team Management Settings. The Team Management settings allow you to specify if managers will be able to view the records of direct reports only, or of both direct and indirect reports, in Team Management applications. All applications in Team Management will reference the setting in the Configure Team Management Settings screen.

> **Note:** This Costpoint release only includes the functionality to specify if managers can view direct/indirect reports in Team Management applications. The additional features mentioned in the updates for Configure Team Management Settings screen will be available in the Phase III release of Team Management enhancements.

Screeen Updates

Address (HTMADDRESS)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Citizenship (HTMCITIZENSHIP)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Company Property (HTMPROPERTY)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Configure Team Management Settings (HTMSETTINGS)

The Configure Team Management Settings screen will allow you to set up different options in the Team Management module. You will now use this screen to specify if managers can only view data for just their direct reports or if they can view data for both direct and indirect reports.

Change Options Subtask

> **Warning:** The settings in the Change Options subtask of the Configure Team Management Settings screen are **not** yet available in this release (Phase II). This subtask will be fully functional in the Phase III release of Team Management enhancements.

The Configure Team Management Settings screen contains a Change Options subtask that provides the following additional options for the Company Property, Phone/Email, Emergency Contacts, and Address applications:

- **Require HR Approval for Changes** — This check box allows you to specify if HR approval is required for any change requests or changes made to an employee record by a manager (change/add/delete). If approval is required, any change requests generated from that application will be saved to a holding table instead of being inserted into the actual Employee table. If HR approval is not required, no change request will be created, the change will instead be saved directly to the appropriate Employee table.

- **Email HR Manager upon Change** — This check box allows you to generate email notifications to an HR manager if a change occurred in an application. Companies that use Costpoint Personnel module can either select to email the appropriate HR manager for the employee or use a default email address. Companies that do not use Costpoint Personnel module will only have the default option available to them.

- **HR Email Method** — This field allows you to specify how HR Administrators will be notified by email. This field is only available if you select the **Email HR Manager upon Change** check box.

- **Default HR Email Address** — This field allows you to specify a default email address for the HR representative. This email address will be sent an email if a manager makes a change to an employee record. This field is only available if you select **Default Email** in the **HR Email Method** drop-down list.

- **Email Manager upon Approval/Rejection** — This setting sends an email the manager who initiated the change request when the HR manager either approves or rejects the change request. Currently all email messages in the notifications (both HR manager and change request manager) are generic system messages. In the future, we may want to consider allowing users to customize those messages in the configuration application.

Configure Personnel Settings (HPMSET)

The Team Management setting, which allows you to specify if managers can view direct reports only, or both direct and indirect reports, is no longer available on this screen. The setting moved to the new Configure Team Management Settings screen which contains settings specifically for Team Management module.

The screen also contains the following changes:

- The **Managers**, **Accident Claims**, and **Required Forms Upload** group boxes were removed.
- The following options will longer be available in a group box:
    - Manager Defaulting Method
    - Accident Claim Numbering Method
    - Required Forms File Type
- The **Required Forms File Type** label replaces the **Required Forms Update** group box.
- The **Training** group box and **Default Job Title Validation Method** options were removed.

- The **By Company-Wide Organization** option label was corrected.

- The option label changed from "Claim Numbering Method" to "Accident Claim Numbering Method."

- The check box title changed from "Require Org ID" to "Require Organization ID (Talent Management)."

Emergency Contacts (HTMEMERGENCYCONTACT)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Government Documents (HTMGOVDOCUMENTS)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Knowledge (HTMKNOWLEDGE)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports; or direct and indirect reports.

Leave (HTMLEAVE)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Life Events (HTMLIFEEVENTS)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Phone/Email (HTMPHONE)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Set Up Company (SYPCOMP)

The new field from Configure Team Management Settings screen, **Team Management view reports method**, was added into company defaults.

Team Details (HTMDETAIL)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Team Information Report (HTRTEAMINFO)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

Total Compensation and Benefits (HTMTOTALCOMP)

The application now references the setting from the new Configure Team Management Settings screen which defines the Team Management method for displaying either only direct reports, or both direct and indirect reports.

System Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 044
- PATCH3484

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	Team Management	HTMADDRESS	Address	cp711_htmaddress_002.zip
People	Team Management	HTMCITIZENSHIP	Citizenship	cp711_htmcitizenship_002.zip
People	Team Management	HTMPROPERTY	Company Property	cp711_htmproperty_002.zip
People	Team Management	HTMSETTINGS	Configure Team Management Settings	cp711_htmsettings_001.zip
People	Team Management	HPMSET	Configure Personnel Settings	cp711_hpmset_004.zip
People	Team Management	HTMEMERGENCYCONTACT	Emergency Contacts	cp711_htmemergencycontact_002.zip
People	Team Management	HTMGOVDOCUMENTS	Government Documents	cp711_htmgovdocuments_002.zip
People	Team Management	HTMKNOWLEDGE	Knowledge	cp711_htmknowledge_002.zip

Domain	Module	Application ID	Application Name	Application File
People	Team Management	HTMLEAVE	Leave	cp711_htmleave_002.zip
People	Team Management	HTMLIFEEVENTS	Life Events	cp711_lifeevents_002.zip
People	Team Management	HTMPHONE	Phone/Email	cp711_htmphone_002.zip
People	Team Management	SYPCOMP	Set Up Company	cp711_sypcomp_022.zip
People	Team Management	HTMDETAIL	Team Details	cp711_htmdetail_002.zip
People	Team Management	HTRTEAMINFO	Team Information Report	cp711_htrteaminfo_002.zip
People	Team Management	HTMTOTALCOMP	Total Compensation and Benefits	cp711_htmtotalcomp_002.zip

More information about this release is on the following page.

Custom Programs Affected

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

To Download the Hot Fix/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 Hot Fix/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 Hot Fix 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.

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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