# Deltek Costpoint® Essentials and Costpoint Foundations

## Cloud Release Notes

August 23, 2018

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# Overview

This document is a compilation of enhancements made in Costpoint, Budgeting and Planning, and Time & Expense between June 10 – July 26, 2018, and which will be available in the Cloud on August 23, 2018.

**Note:** Release notes contain summaries of the enhancements made. Refer to the online help for additional details.

Costpoint 7.1.1 Online Help

# Costpoint

## Accounting

There are no changes to the Accounting domain for this release.

## Contracts

### Contract and Subcontracts

Costpoint now provides you the ability to generate reports in the Contracts domain, which can help you determine if decisions need to be made regarding a contract or subcontract. These reports provide contract and subcontract details including but are not limited to the following:

- Total award and percent complete values
- Task orders that have been assigned to specific vehicles
- Expiration dates of non-disclosure agreements and certificate of insurance
- Contract types and end dates

You have various options for grouping and sorting the data in the reports. You can also include inactive contracts and subcontracts.

Four new applications have been created to support this enhancement, while two existing screens were recently updated. In a previous release, a new check box (**Exclude from Reports**) was added to Manage Contracts and Manage Subcontracts to allow you to exclude certain contracts and subcontracts from reports generated in the Contracts domain.

### Screen Updates

#### Print Contract Backlog Report (CNRBKL)

Use this new screen to print the Contract Backlog Report. This report displays the percent complete funding values and revenue for the contracts in the selected range of prime contract numbers, contract vehicles, and contract types. You can use this information in determining how much money is left on each contract and whether action needs to be taken due to contract overruns.

You can sort the data in the report by contract end date and contract vehicle as well as include inactive contracts. There is an option to select either the target or actual rate, which is used to display actual or target revenue or percent complete funding.

To access the screen, go to **Contracts » Contracts » Contract Reports and Inquiries » Print Contract Backlog Report**.

#### Print Contracts by Administrator Report (CNRADM)

You can now print contract information by contract administrator through this new screen. The Contracts by Administrator Report lists all the contracts sorted by contract administrator in the selected range of contract statuses, contract types, and contract vehicles. It includes information on awarded and funded contract values, task order numbers, and risk status. You can use this report to assess the responsibilities and workload of the contract team.

The report can include inactive contracts and can be sorted by administrator ID or name.

You can access the screen by clicking **Contracts » Contracts » Contract Reports and Inquiries » Print Contracts by Administrator Report**.

### Print Contract Vehicle Report (CNRVEH)

This new screen allows you to print a list of contracts grouped by contract vehicle in the selected range of vehicle codes, contract statuses, contract types, and primary customers. The task orders assigned to contract vehicles as well as contract and funded values are also included in the report.

Data in the report is automatically sorted by vehicle code, but you have options to include additional sorting option levels by contract end date, status, and/or type. You can also include inactive contracts.

To access this application, click **Contracts » Contracts » Contract Reports and Inquiries » Print Contract Vehicle Report**.

### Print Vendor COI & NDA Expiration Report (CNREXP)

Use this new application to print a report containing expiration dates of subcontractor certificate of insurance (COI) and non-disclosure agreement (NDA) documents associated with subcontractors.

By default, the report is sorted by subcontractor/vendor ID, but you can select NDA expiration date or COI expiration date as the second sorting level.

You can access this screen through **Contracts » Contracts » Subcontract Reports and Inquiries » Print Vendor COI & NDA Expiration Report**.

## New Contracts Domain: Change to Import GovWin IQ Data

In a previous release, the Contract Management module under the Projects domain was changed to a separate Contracts domain. With this change, new modules were created and several applications within the Contract Management solution were moved to these new modules.

The Import GovWin IQ Data application was among those that were transferred to the Opportunities module. However, access to this application was retained under the Contract Management Controls module.

In this release, the access rights to this screen is now under Opportunities. Make sure that you check if your users and user groups are assigned the correct application rights through the Manage Users and Manage User Groups screens in the Admin domain.

## GovWin IQ Subtask Updates

Several new fields have been added and changed on the GovWin IQ subtask of Manage Opportunities to allow you to modify entries in some of the fields and sort data based on milestone dates, GovWin IQ login ID, and employee ID. The application logic has also been updated when matching the employee ID with the employee's GovWin IQ login ID.

More details are listed below:

- GovWin IQ Key Dates subtask
  - The Comments and Responsible Party fields are now editable.
  - You can now sort data by Milestone, Date (IQ Estimate), Comments, and Responsible Party.
- GovWin IQ Added By subtask
  - A new field, **GovWin IQ ID**, has been added. For **GovWin IQ** records, this field displays the GovWin IQ login ID of the employee who marked the opportunity in GovWin IQ for import into Costpoint. For **Manual** or new records, click lookup to select the GovWin IQ login ID of the employee who also recommended the opportunity but did not tag the opportunity record in GovWin IQ. The **GovWin IQ ID** is mapped to the employee on the Product Interface tab of Manage Employee Information.
  - The **Name** field has been split to **First Name** and **Last Name** to display the employee's first and last names in separate columns. These fields are editable only for **Manual** records.

- You can now sort data by **GovWin IQ ID**, **First Name, Last Name**, **Employee ID**, and **Source**.
- When importing **GovWin IQ** records, the system will match the user login ID in GovWin IQ to a Costpoint employee using the following logic:
  1. Costpoint matches the GovWin IQ login ID (email address used for login) to the Costpoint field EMPL.GOVWINIQ_LOGIN_ID.
  2. If not found, Costpoint matches the GovWin IQ login ID to EMPL.EMAIL_ID.
  3. If still not found, Costpoint matches the first name and last name from GovWin IQ to the EMPL.FIRST_NAME and EMPL.LAST_NAME fields in Costpoint.
  4. If still not found, the **Employee ID** field on the GovWin IQ Added By subtask is left blank and non-editable.

## Ability to Exclude Contracts and Subcontracts from Reports

A new check box, **Exclude from Reports**, has been added to the Manage Contracts and Manage Subcontracts screens to allow you to indicate which contract/subcontract records should be excluded from reports in the Contracts domain. This is important when you need to generate reports and exclude certain types of contracts (for example, indefinite delivery/indefinite quantity and blanket purchase agreement contracts or subcontracts) to avoid overstating the reports.

**Note:** This change has been rolled out in preparation for the future release of the new reporting screens in the Contracts domain.

# Projects

There are no changes to the Projects domain for this release.

# People

## Allow Updating of Organization IDs on Job Templates

This Costpoint release will allow you to modify the Organization IDs on existing job templates. In order to implement the enhancement, the Organization ID will no longer be the primary key of job templates.

### Screen Updates

The release updates the following screens for this enhancement:

#### Approve Position Requisitions (HPMAREQ)

- The organization ID was removed from the primary key of job templates.
- A new Original ID field displays the original job template ID. This field will only be populated if there was previously another record in the table with the same ID.
- When you use the Query function, the Find and Query tab now allows you to search for job templates using the Original ID field.

#### Configure Personnel Settings (HPMSET)

A new **Require Org ID** check box allows Deltek Talent Management users to either require or not require the Organization ID on the job templates for a company.

**Note:** This check box is enabled only when you have a Deltek Talent Management license. If you opted to clear the Require Org ID check box, and then you stopped using Deltek Talent Management, you must manually select this check box to require organization IDs on job templates.

## Manage Employee Information (LDMEINFO)

When creating employees through SilkRoad or Talent Management, and when searching for a job template, the application uses the original ID for the job template as the job template ID. If the original ID does not exist, the application uses the job template ID.

## Manage Job Templates (HPMREQR)

The following are updates to the Manage Job Templates screen:

- The organization ID was removed from the primary key of job templates.
- The **Organization ID** field can now be edited.
- A new **Original ID** field displays the original job template ID. This field will only be populated if there was previously another record in the table with the same ID.

  The company ID is now part of the primary key of job templates. Previously, the application performs a validation to ensure that each job template ID was unique to a company ID.

## Setup Company (SYPCOMP)

When you create a new company, the application applies a default value of **Y** to new **Require Org ID** field on the Configure Personal Settings application (HP_PER_ADM_SETTINGS.ORG_REQ_FL).

## Transfer SilkRoad Data (LDPSRDAT)

When searching for an existing job template ID (H_POS_RQ_RQST.RQ_NO), the application determines if it exists for the employee's company. If not, the application searches the **Original ID** field (H_POS_RQ_RQST.ORIG_RQ_NO).

When transferring the job template information to SilkRoad, if data exists in the **Original ID** field, the application sends that ID number instead of the job template ID.

## Transfer Talent Management Data (EMPHRSDAT)

When searching for an existing job template ID (H_POS_RQ_RQST.RQ_NO), the application determines if it exists for the employee's company. If not, the application searches the **Original ID** field (H_POS_RQ_RQST.ORIG_RQ_NO).

When transferring the job template information to Deltek Talent Management, if data exists in the Original ID field, the application sends that ID number instead of the job template ID.

## Known Issue

### Newly Created Company Inherits the Auto-Approve Position Requisition Value of Login Company

**Deltek Defect Tracking Number: 967206**

**Description:** When you log in to Costpoint using a company with a default approver on the Configure Personnel Settings screen (the **Auto-Approve Position Requisitions** check box was selected and a valid **Default Requisition Approver** was specified), and then you create a new company, the created company inherits the login company's **Auto-Approve Position Requisitions** (REQ_AUTO_APPRVL_FL) column value in the H_PER_ADM_SETTINGS table.

**Customers Impacted:** This defect affects Costpoint Personnel users.

**Workaround Before Fix:** Set up an approver on the Manage Position Requisition Approvers screen, and then use the approver on the Configure Personnel Settings screen.

**Additional Notes:** None.

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# Regulatory and Compliance

## 2018 New Mexico Withholding Tax

This release updates Costpoint to support the following changes to the New Mexico withholding tax:

- The State's tax brackets were updated.
- The amount per allowance increases from $4,050 to **$4,150**.
- When calculating New Mexico state tax withholding for an employee, if that employee claims more than three allowances on his/her W-4, only three of the allowances will be applied.

Note: In order to apply this change, New Mexico exemption amounts were moved from the Manage State Taxes screen to the Manage State Tax Withholding Adjustments screen where the transferred exemptions have an exemption type of **Personal Exemption Allowances** in the **Type** field.

## 2018 Kentucky Withholding Tax

Kentucky's withholding tax formula was updated to reflect the recently enacted 5% flat tax rate. In relation to the change, this release updates Costpoint so that the 2018 withholding tables reflecting the 5% flat tax rate will be used in payroll. The following are updates to the existing records for Kentucky, effective January 1, 2018, on the Manage State Taxes screen and Manage State Tax Tables screen.

- The withholding formula was updated to use a 5% flat tax rate.
- The exemption credit of $10 was removed.

**Attention:** For more information, please refer to the following link on the Kentucky Department of Revenue website: https://revenue.ky.gov/Forms/42A003%20(TCF)%202018%20Withholding%20Tax%20Formula%20(Released%20May%202018).pdf

## 2018 Q3 July SUTA Electronic Filing Updates

This Costpoint release includes enhancements to support the 2018 SUTA electronic filing updates of Alaska and Florida.

### Alaska

The State of Alaska updated the Occupational Coding Manual for 2018. This release updates the Costpoint database tables for Alaska Geographic Code (S_AK_GEO_CD) and Alaska Occupational Code (S_AK_OCC_CD) to reflect the 2018 coding changes.

This release also adds new validations on the Create Quarterly SUTA Tax File (PRPSMM) screen to ensure that there are no invalid or missing codes when you create the tax file for Alaska.

## Florida

The Florida Department of Revenue released an updated reemployment tax specification (Schema v2018 1.0) last March 2018. In order for Costpoint to be compliant with Florida's requirement, this release updates the Create Quarterly SUTA Tax File screen to use the latest XML Schema for the State of Florida.

# Materials Management

## DVGMSSUBLIB Library

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

- Manage MRP Action Messages (MRMACTM)
- Manage Mater Production Schedule Action Messages (MSMACTM)
- Manage Detailed Part Schedule (MRMDTPT)

## Organizational Security

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Materials domain. This feature ensures that correct user access is applied to the logged-in user ID in accessing records by validating and filtering records/transactions as authorized for the user ID.

### Manage Vendor Returns (RCMRTRN)

Costpoint now finds and filters existing records based on your logged-in user ID's organization rights for the original PO buyer's organization ID. This change allows you to see POs with the original PO buyer's organization ID that you are authorized for. Costpoint will not display POs without the buyer's organization ID.

## Other Screen Updates for Organizational Security

Changes were made on these screens in preparation for the future implementation of the Organization Security feature:

- Enter Issues to Project/Account/Org or PO (INMPAISS)
- Enter Quantity Adjustments (INMQTADJ)
- Enter Scrap Adjustments (INMSCADJ)
- Enter Location Transfers (INMLOXFR)
- Create Mass Inventory Transfers (INPMSXFR)
- Manage Inventory Requests (INMRQST)
- Manage Inventory Reservations (INMPARSV)
- Print Inventory Reorder Report (INPREORD)
- Print Inventory Transaction History (INRHSTPA)
- View Inventory Transaction History (INQHSTPR)
- Configure Inventory Accounts (INMACCT)
- Configure Default Project Inventory Accounts (INMWACCT)
- Manage Inventory Projects (INMPROJ)
- Enter Cost Adjustments (INMCSADJ)

- Enter Inventory Transfers (INMPAXFR)
- Manage PO/Req inventory Reservations (INMPORSV)
- Create Inventory Allocations (INPALLOC)

## MRQSPALIB Library

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

- View Summary Part Availability (MRQSPA)
- Manage Detailed Part Schedule (MRMDTPT)

## POMPOLIB Library

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

- Expedite Purchase Orders (POMEXPD)
- Manage Purchase Orders (POMMAIN)
- Create Blanket Purchase Order Releases (POMRELS)
- Update Subcontract Retainage PO Status (POMSCST)
- Approve Pending Purchase Orders (POMSTAT)
- View Purchase Order Change Orders (POQCHNG)
- View Item Purchasing Information (POQITEM)
- View Purchase Order Status (POQSTAT)
- View Purchase Requisition Status (PPQRQSTS)
- Manage Purchase Order Vouchers (POMPOVCH)
- Create Debit Memos (POPDM)
- Approve Subcontractor Invoices (SMMAINVC)
- Manage Subcontractor Invoices (SMMMINVC)

## BMMMDOCLIB Library

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

- Manage Documents (BMMMDOC)
- Release Documents (BMMRDOC)

## MMQALLOCLIB Library

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

- View Part Inventory (INQPINV)
- View Manufacturing Order Status (PCQMOST)

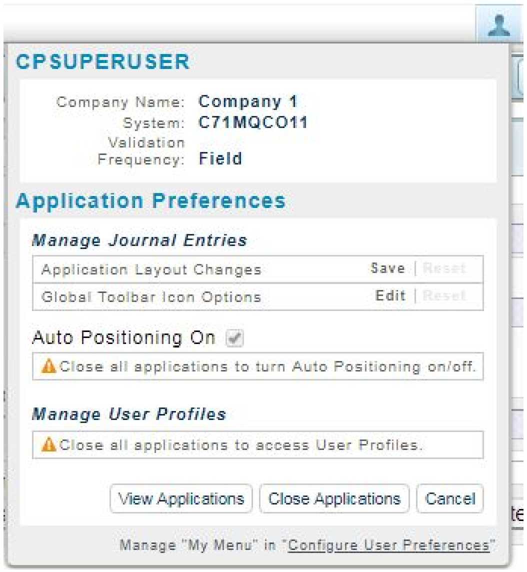
# Administration

## Improved User Configuration Screen

The User Configuration screen has been renamed as User Preferences and the fields were reordered to streamline navigation to support the upcoming release of Costpoint's new UI.

### Reordered Fields

The following image displays the User Preferences screen with reordered fields. In this example, the Manage Journal Entries screen was open when the User Preferences screen was launched.




**Note:** The Manage User Profiles section only appears for System Administrators.

## Updated Copyright on Welcome Screen

The copyright information is updated to reflect the year of the most recent Costpoint release.

## Improved Costpoint Mobile Menu

The menu items in the mobile menu are renamed to support the upcoming release of Costpoint's new UI and reordered to streamline navigation.

### Changes to the Mobile Menu

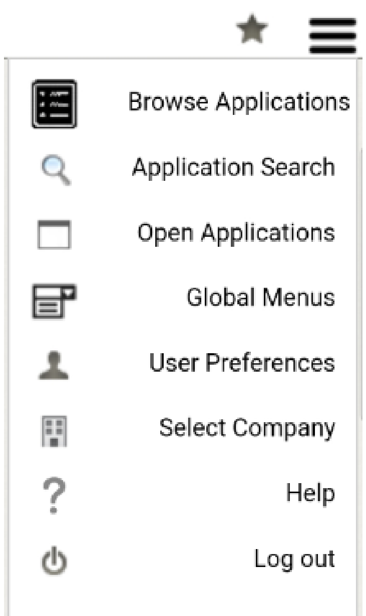
#### Reordered and Renamed Menu Items

The update to menu items are explained in the following table:

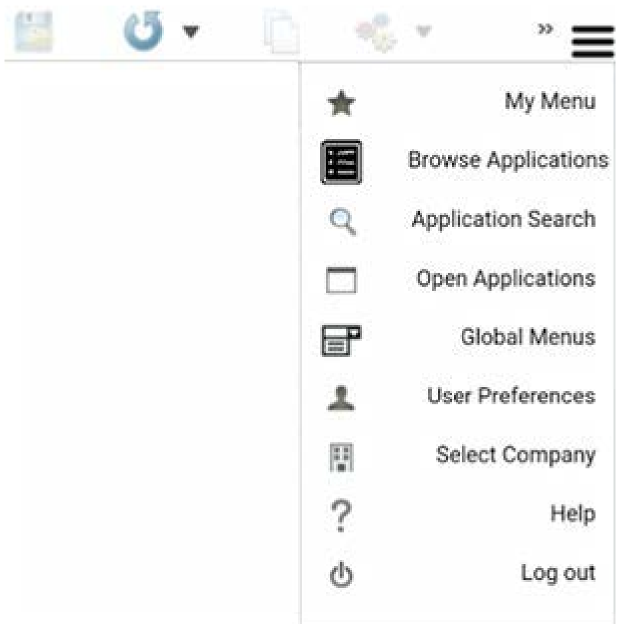
| The menu name… | Is renamed to… |
|---|---|
| *Favorites* | My Menu (star icon) |
| *Apps* | Browse Applications |
| *Search apps* | Application Search |
| *Running apps* | Open Application |

| The menu name… | Is renamed to… |
|---|---|
| *File Menu* | Global Menus |
| *User (Screen) Config* | User Preferences |
| *Company* | Select Company |
| *Help* | Help |
| *Logout* | Log Out |

Also, if multiple icons fill the toolbar, then the My Menu icon will display in the mobile menu instead of the toolbar.




My Menu icon on the toolbar




My Menu in the Mobile menu

# 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

## Deltek Talent Management Integration Enhancements

This Costpoint release provides the following enhancements to Costpoint - Deltek Talent Management integration:

- Automatically assign employee IDs and accept partial employee records
- Onboarding of rehired employees
- Populate the **Last Day Worked** field based on the termination date

## Automatically Assign Employee ID and Import Partial Employee Records

This release provides the ability to auto-generate employee IDs in Costpoint. If you use Deltek Talent Management, you can now import employee records that do not have employee ID values and allow Costpoint to auto-generate the IDs. The auto-generate employee ID function is available to all Costpoint users when manually entering an employee record. Only Deltek Talent Management users may import employees without employee IDs and have them auto generated.

**Warning:** If you use Deltek Talent Management; after you download this feature from DSM, you must perform the applicable procedure in the Initialize Talent Management HUA ID-to-Costpoint Employee ID Mapping section. Otherwise, the integration process between Costpoint and Deltek Talent Management will no longer function.

### Configure Labor Settings (LDMLABOR)

- The Employee Options tab contains a new **Auto-Generate Employee IDs** check box enables the functionality to automatically generate IDs for new employees. This check box displays as selected and disabled if you select the **Auto-Generate Employee IDs for All Companies** check box on the Corporate Labor Settings subtask. This functionality is currently only available for Deltek Talent Management users.
- The Corporate Labor Settings subtask contains a new **Auto-Generate Employee IDs for All Companies** check box. Select this check box to enable Costpoint to automatically generate new employee IDs for companies within the corporation.

### Import Employee Data (AOPUTLEL)

If you select the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen, the following error message displays when you attempt to open the Import Employee Data screen: “When auto-generation of employee IDs is enabled in your company’s Configure Labor Setting screen, you may not import any new employee IDs.”

### Link Talent Management User IDs to Existing Employees (EMPTMUI)

When you run this new toolkit, it will populate the Costpoint Employee (EMPL) table with each applicable employee’s Deltek Talent Management user ID (HUA ID). It will also set the **Active HUA ID Mapping** flag which indicates whether the Costpoint Employee has an active or inactive mapping to the HUA ID.

**Attention:** The timing of this toolkit depends on whether you’re an existing Costpoint 7.1.1 user, an existing Deltek Talent Management user, an existing client for both Costpoint 7.1.1 and Deltek Talent Management, or a new user for both products.

You must run this toolkit after installing the Auto-Assign Employee IDs feature and before importing or exporting employees in the Transfer Talent Management Data screen. Running this toolkit will populate the Deltek Talent Management HUA ID (HUA_ID) and Active HUA ID Mapping (HUA_ACTV_MAP_FL) columns in the Manage Employee Information (EMPL) table.

For detailed steps on using this toolkit, please refer to the Talent Management HUA ID-to-Costpoint Employee ID Mapping Initialization Scenarios section.

### Manage Employee ID Defaulting Rules (EMMIDDEFAULT)

Use the new Manage Employee Defaulting Rules screen to enter and manage defaulting rules for your employee ID format codes.

**Note:** You can access the Manage Employee ID Defaulting Rules screen only if you select the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen. Otherwise, an error will display when you attempt to open the application.

You must establish employee ID defaulting rules in the following scenarios:

- If you selected the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen for companies, you must establish employee ID defaulting rules for each of company that has this labor setup.
- If you selected the **Auto-Generate Employee IDs for All Companies** check box on the Corporate Labor Settings subtask of the Configure Labor Settings screen, you must establish at least one defaulting rule for all companies or you can establish defaulting rules for each company.

To launch the screen, go to the **People » Employee » Employee Controls** menu.

### Manage Employee ID Formats (EMMIDFORMAT)

Use the new Manage Employee ID Formats screen you to establish the formatting of employee IDs. Costpoint will use this format when you opt to auto-generate the employee IDs.

**Note:** You can access the Manage Employee ID Formats screen only if you select the Auto-Generate Employee IDs check box on the Configure Labor Settings screen. Otherwise, an error will display when you attempt to open the application.

To launch the screen, go to the **People » Employee » Employee Controls** menu.

### Manage Employee Information (LDMEINFO)

The following are updates on the Manage Employee Information screen:

- A new **HUA ID** field allows you to enter the Talent Management user ID for the employee. The application uses this field to map Costpoint employee IDs to Deltek Talent Management user IDs when you import employee data into Costpoint.
- A new **Talent Management Active HUA ID Mapping** check box indicates whether or not the specified HUA ID is actively mapped to the Costpoint employee. If this check box displays as selected, the Transfer Talent Management Data application uses the specified HUA ID to determine whether or not the employee is a rehire.
- The application performs a validation to check the staging database tables when an adding an employee.

### Print Data Dictionary Report

The Print Data Dictionary Report application now provides information for the following new columns on the Employee (EMPL) table:

- **HUA_ACTV_MAP_FL** — Flag that indicates if the employee's HUA ID is active.
- **HUA ID** — HUA ID sent from Talent Management.

### Set Up Company (SYPCOMP)

When you create a new company, the application populates the EMPL_ID_AUTOGEN_FL column in the LAB_SETTINGS database based on the values of the company being copied.

### Transfer Talent Management Data (EMPHRSDAT)

- When you run the Transfer Talent Management Data process, the application generates employee IDs for imported Deltek Talent Management employee records without IDs.
- The application adds employee records to staging database tables if the Deltek Talent Management records are missing any required fields. The application will not add records to staging database tables if the employee ID is missing and auto-generation of employee IDs is not enabled.
- The application performs validations to ensure that the imported file from Deltek Talent Management contains all fields required to generate an employee ID. The application will not add records to the staging database tables if it could not generate an employee ID.
- The application removes the employee records from the staging database tables once a complete employee record is sent from Deltek Talent Management.
- The application uses the following staging database tables:
  - EMPL_STG
  - EMPL_PHONE_STG
  - EMPL_LAB_INFO_STG
  - DFLT_REG_TS_STG
  - EMPL_TAX_STG

### View Employee Information (PRQEINFO)

The screen contains new a **HUA ID** field and a **Talent Management Active HUA ID** Mapping check box. These display the information from the same fields on the Manage Employee Information screen.

## Onboarding of Rehired Employees

This feature provides the ability to include rehires when importing employees that have completed the onboarding process in Deltek Talent Management. Importing of an existing Costpoint employee ID that was rehired to a different company is **not** supported at this time.

### Manage Employee Information (LDMEINFO)

The application was updated to support the processing of rehired employee records that were imported from Deltek Talent Management to Costpoint through the Transfer Talent Management Data process.

### Transfer Talent Management Data (EMPHRSDAT)

The following are the updates to the Transfer Talent Management Data screen for the onboarding of rehires:

- The application process can now identify new hires and rehires. It also determines and identifies when a new employee record needs to be generated or if an existing record will be updated.
- When exporting employees, the application will not include employee records that does not have an active mapping to a HUA ID (Talent Management User ID). An employee record does not have an active mapping if the **HUA_ID_ACTV_AP_FL** column is **N**.
- When importing rehires, if the employee record in Costpoint indicates that the employee is still employed (either the **Termination Date** field is blank or the **Termination Date** value is later than the rehire date), an error will be logged, and the rehired employee will not be imported.

## Populate the Last Day Worked Field Based on the Termination Date

When you enter a value in the **Termination Date** field on the Manage Employee Information screen, the screen displays a warning message which provides you the option to populate the **Last Day Worked** field with the date that you entered in the **Termination Date** field. If you decline the option to auto-populate the **Last Day Worked** field, you must manually enter a date in the **Last Day Worked** field before saving the record.

Existing termination records will not be affected by this update and the warning message will only display for future termination records.

# Initialize Talent Management HUA ID-to-Costpoint Employee ID Mapping

Before you use Costpoint's Auto-Assign Employee ID feature, you must run the Link Talent Management User IDs to Existing Employees (EMPTMUI) toolkit based on your current Costpoint/Deltek Talent Management setup.

You must run the Link Talent Management User IDs to Existing Employees toolkit after downloading the Auto-Assign Employee IDs feature and before importing or exporting employees in the Transfer Talent Management Data screen. Running this toolkit will populate the HUA ID and Active HUA ID Mapping columns in the Manage Employee Information table (EMPL.HUA_ID and EMPL.HUA_ACTV_MAP_FL).

## Scenarios

Refer to the following scenarios and perform the corresponding steps that apply to your company's setup:

### Scenario 1

**You currently use both products, Costpoint 7.1.1 and Deltek Talent Management, and you installed Costpoint's Auto-Assign Employee ID feature which was released in June 2018.**

| Step | Product | Details |
|---|---|---|
| **1** | Deltek Talent Management | Generate the **export_user_id_file** file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| **2** | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the **People » Employee » Employee Utilities » Link Talent Management User IDs to Existing Employees** toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |
| **3** | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs.<br><br>**Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.<br><br>▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 4.<br>▪ If you do **not** want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |

| Step | Product | Details |
|---|---|---|
| **4** | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| **5** | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings** screen, select the Labor option in the Individual Settings group box, and then run the application process. |

### Scenario 2

**You currently use Deltek Talent Management and you purchased Costpoint version 7.1.1 after May 2018.**

| Step | Product | Details |
|---|---|---|
| **1** | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, and ensure that the Auto-Generate Employee IDs check box is not selected.<br><br>**Note:** If the Auto-Generate Employee IDs check box is selected, clear the check box. After saving your changes, go to the Rebuild Global Settings screen, select the Labor option in the Individual Settings group box, and then run the application process. |
| **2** | Costpoint | Create employee records in Costpoint. You can create employee records by performing either of the following methods:<br>▪ Entering employee records on **People » Employee » Basic Employee Information » Manage Employee Information** screen<br>▪ Importing an employee file on **People » Employee » Employee Interfaces » Import Employee Data** screen. |
| **3** | Deltek Talent Management | Manually assign the newly created Costpoint employee IDs to your existing Talent Management users. |
| **4** | Deltek Talent Management | Generate the export_user_id_file file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| **5** | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the **People » Employee » Employee Utilities » Link Talent Management User IDs to Existing Employees** toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |
| **6** | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs. |

| Step | Product | Details |
|---|---|---|
| | | **Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.<br>▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step **4**.<br>▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |
| **7** | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| **8** | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings**, select the Labor option in the Individual Settings group box, and then run the application process. |

### Scenario 3

**You currently use Costpoint 7.1.1 and you purchased Deltek Talent Management after May 2018.**

| Step | Product | Details |
|---|---|---|
| 1 | Costpoint | Go to **People » Employee » Employee Interface » Transfer Talent Management Data** screen, and run a full export of the following:<br>▪ Employees<br>▪ Organizations<br>▪ Job Templates<br>▪ Detail Job Titles<br>▪ Labor Locations<br>**Note:** You may opt to exclude employees that were terminated before a specific date. |
| 2 | Deltek Talent Management | Generate the **export_user_id_file** file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| 3 | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |

| | | |
|---|---|---|
| 4 | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs.<br>**Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.<br>▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 5.<br>▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |
| 5 | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| 6 | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings** screen, select the Labor option in the Individual Settings group box, and then run the application process. |

### Scenario 4

**You purchased both products, Costpoint 7.1.1 and Deltek Talent Management, after May 2018.**

| Step | Product | Details |
|---|---|---|
| **1** | Costpoint | Create employee records in Costpoint. You can create employee records by performing either of the following methods:<br>Entering employee records on **People » Employee » Basic Employee Information » Manage Employee Information** screen<br>Importing an employee file on **People » Employee » Employee Interfaces » Import Employee Data** screen. |
| **2** | Costpoint | Go to **People » Employee » Employee Interface » Transfer Talent Management Data** screen, and run a full export of the following:<br>▪ Employees<br>▪ Organizations<br>▪ Job Templates<br>▪ Detail Job Titles<br>▪ Labor Locations |

| Step | Product | Details |
|---|---|---|
| **3** | Deltek Talent Management | Generate the **export_user_id_file** file in Deltek Talent Management's **Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check** screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs. |
| 4 | Costpoint | Use the **export_user_id_file** file you just generated in Deltek Talent Management to run the Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management. |
| 5 | Costpoint | Determine if you want to allow Costpoint to auto generate employee IDs.<br><br>**Warning:** If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.<br><br>▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 6.<br>▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management. |
| 6 | Costpoint | Go to **People » Labor » Labor Controls » Configure Labor Settings** screen, select the Auto-Generate Employee IDs check box, and then save the record. |
| 7 | Costpoint | Go to **Administration » System Administration » System Administration Utilities » Rebuild Global Settings** screen, select the Labor option in the Individual Settings group box, and then run the application process. |

## Errors

All warnings and errors are written to a log file (EMPTMUI_yymmddhhTms.log). The log file will be saved in the location that you specified in the **File Location** field of the Link Talent Management User IDs to Existing Employees toolkit. If a location has not been specified, warnings and errors will be written to the database and you can retrieve it from the File Download (SYMDLMGR) screen.

## Known Issues

### Employees not Terminated in Costpoint were Processed as a Rehire

**Deltek Defect Tracking Number: 963051**

**Description:** When the **Talent Management Active HUA ID Mapping** column contains a value of No and the employee has not been terminated in Costpoint, the Transfer Talent Management Data screen still allows you to successfully import a rehired employee record into Costpoint.

Regardless of the value of **Talent Management Active HUA ID Mapping** column, the processing of rehires should not be successful if the Costpoint employee record has no termination date.

**Customers Impacted:** This defect affects Costpoint - Deltek Talent Management Integration users.

**Workaround Before Fix:** None.

**Additional Notes:** The application performs a validation only if the employee has both a termination date and an active HUA ID mapping. The HUA ID mapping must be active if there is no termination date as of the Deltek Talent Management hire date.

# Budgeting and Planning

## Organizational Budgeting

### EACCT Table Updated with Account Name Details During Refresh

During the refresh process, the EACCT table is now updated with Account Name details, enabling use of this information in Costpoint Enterprise Reporting.

## Project Budgeting

There were no changes to this area.

## Budgeting Administration

There were no changes to this area.

Deltek Know more. Do more.®

# Time and Expense

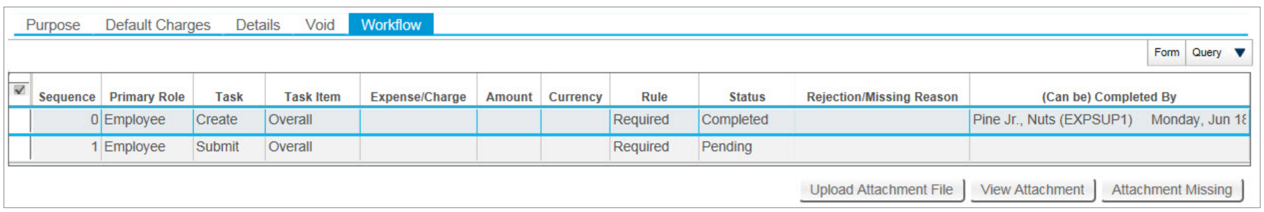
## Time

There are no updates to this area.

## Expense

### Expense Report Workflow Moved to Tab

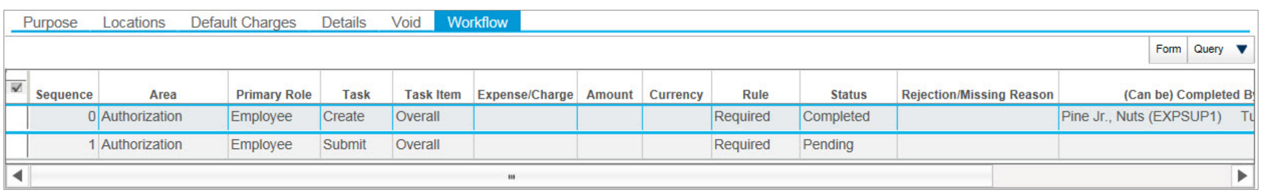
The Workflow subtask on **Expense » Expense Report » Manage Expense Reports** screen has been reconfigured as a tab for easier access. On new expense reports, the Workflow tab does not display until the expense report is saved.




| Sequence | Primary Role | Task | Task Item | Expense/Charge | Amount | Currency | Rule | Status | Rejection/Missing Reason | (Can be) Completed By |
|---|---|---|---|---|---|---|---|---|---|---|
| 0 | Employee | Create | Overall | | | | Required | Completed | | Pine Jr., Nuts (EXPSUP1) Monday, Jun 18 |
| 1 | Employee | Submit | Overall | | | | Required | Pending | | |

### Expense Authorization Workflow Moved to Tab

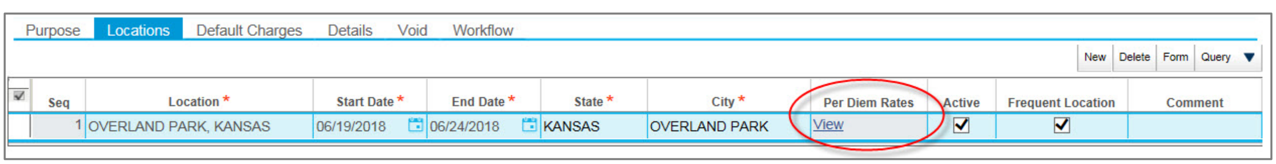
The Workflow subtask on **Expense » Expense Authorization » Manage Expense Authorization** screen has been reconfigured as a tab for easier access. On new expense reports, the Workflow tab does not display until the expense authorization is saved.




| Sequence | Area | Primary Role | Task | Task Item | Expense/Charge | Amount | Currency | Rule | Status | Rejection/Missing Reason | (Can be) Completed B |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 0 | Authorization | Employee | Create | Overall | | | | Required | Completed | | Pine Jr., Nuts (EXPSUP1) Tu |
| 1 | Authorization | Employee | Submit | Overall | | | | Required | Pending | | |

### Expense Report Per Diem Rates Now Display as Pop-ups

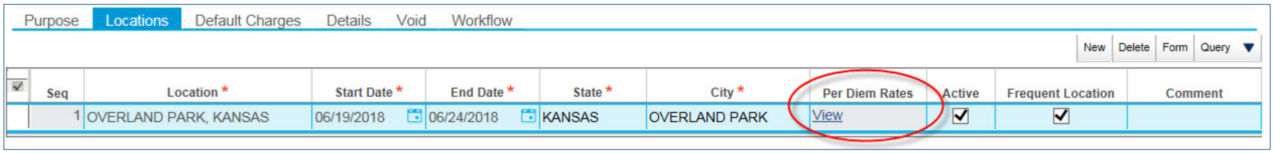
Per Diem rates now display in a pop-up window on the Expense Report Locations tab. The pop-up displays the rates before and after you save while in the normal Costpoint layout and also in Wizard mode after you select the location.




| Seq | Location * | Start Date * | End Date * | State * | City * | Per Diem Rates | Active | Frequent Location | Comment |
|---|---|---|---|---|---|---|---|---|---|
| 1 | OVERLAND PARK, KANSAS | 06/19/2018 | 06/24/2018 | KANSAS | OVERLAND PARK | View | ☑ | ☑ | |

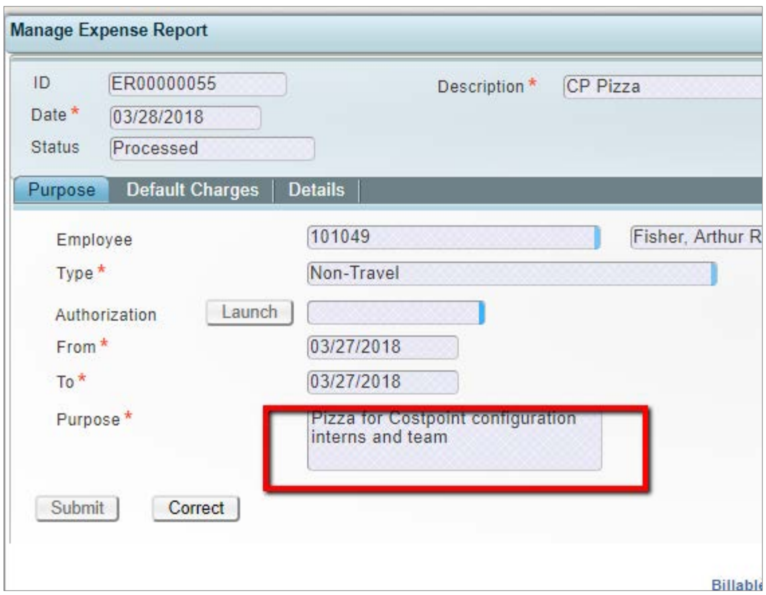
### Expense Authorization Per Diem Rates Now Display as Pop-ups

Per Diem rates now display in a separate pop-up window when you click the **View** link in the Per Diem Rates column on the Expense Authorization Locations tab.



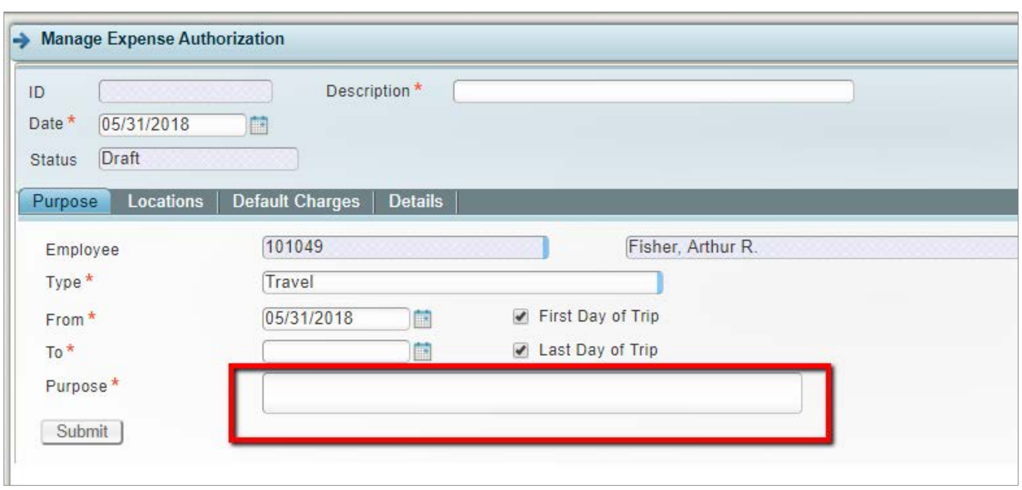

## Expense Report Purpose Field Enlarged

The vertical size of **Purpose** field of the **Expense » Expense Reports » Manage Expense Report** screen was increased to allow at least four lines of text.




## Expense Authorization Purpose Field Enlarged

The vertical size of **Purpose** field of the **Expense » Expense Authorizations » Manage Expense Authorization** screen was increased to allow at least four line of text.



# Configuration

There are no updates to this area.