Deltek Know more. Do more.®

Deltek Costpoint Hot Fix Readme

Release Date: October 22, 2018

Costpoint Team Management Phase III

The phase III release of Costpoint Team Management will allow managers to change the data for their employees on the Emergency Contacts screen. Other Costpoint Team Management applications will allow data changes in later releases.

If your setup in Configure Team Management Settings screen requires Human Resources (HR) approval for data changes in the Emergency Contacts screen, the changes entered by a manager on the Emergency Contact screen will create change requests. These change requests will be saved to the Team Management change request holding table (HT_CHANGE_REQUESTS). Otherwise, if the changes do not require HR approval, Costpoint will directly update the appropriate employee table.

There can only be one change request for an employee/key field in the holding table and the status can be changed by a HR manager. Once a change request has been approved and appropriate tables have been updated, the change request will be automatically deleted. If a manager makes a change and it has not yet been updated, it will still be available for further edits. The change request table will also save the original field data to allow comparison with the new data. If you have set up email notifications on the Configure Team Management Settings screen, Costpoint will send an email to the HR manager when a record is saved.

The updated Emergency Contacts screen will also have the following new change request fields:

- **Status** — This field displays the request status as **Pending**, **Approved**, or **Rejected**.
- **Status Date** — This field displays the timestamp from when the status was last changed.
- **Notes** — This field allows both the manager and HR manager to enter comments.

Screen Updates

Manage Change Requests (HTMCHANGES)

A new screen, Manage Change Requests, allows HR managers to view and approve/reject the change requests. HR managers will be able to view the new data against the original data in side by side comparisons to allow them to easily view the changes. HR managers will only be able to change the **Status** field and the **Notes** field in this application. If you enable email notifications on the Configure Team Management Settings screen, the application will send an email notification to the change request manager when a status changes.

> **Note:** An HR manager must use a user ID that is associated with an employee ID in order to approve/reject the change requests.

Emergency Contacts (HTMEMERGENCYCONTACT)

The Emergency Contacts screen includes the following updates:

- Managers can now change the data for their employees.

- If data in the change request table exists, the application displays the change request status, date, and related comments in a new **Change Request Information** group box.
- The **Employee Status** field is now available in the record header. You can also use the **Employee Status** field in the Find/Query functions of the screen.

Activate Pending Change Requests (HTPCHANGES)

A new screen, Activate Pending Change Requests, allows the HR managers to update any approved changes to the appropriate employee tables. They will also be given the option to update any pending changes to the employee tables if they do not wish to go through the approval process. A report will show the potential changes to the employee tables before the actual update. A warning report will display any employee data where the employee record was changed after the change request was entered. Users are also given the option to delete any rejected change requests.

This screen can be used by an HR administrator to mass update all the approved and or pending change requests made by a manager in Costpoint Team Management.

System Requirements

This enhancement requires the following Costpoint 7.1.1 releases.

- Costpoint 7.1.1 System JAR 044
- PATCH3524

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	HTMCHANGES	Manage Change Requests	cp711_htmchanges_001.zip
People	Team Management	HTMEMERGENCY CONTACT	Emergency Contacts	cp711_htmemergencycontact _003.zip
People	Team Management	HTPCHANGES	Activate Pending Change Requests	cp711_htpchanges_001.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.