

Deltek Costpoint® Enterprise Cloud

May 2018 Release Notes

May 28, 2018

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Overview

This document is a compilation of enhancements made in Costpoint, Budgeting and Planning, and Time & Expense from January 16 - April 9, 2018.

These enhancements were available in the non-production environment from April 13 – May 27, 2018. They will be applied to the production environment on May 28, 2018.

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

[Costpoint 7.1.1 Online Help](#)

Service Requests

On or near June 25, 2018 the following Web service requests will be available:

- **Database Refresh** — Use this request to overwrite a system/database in the cloud with a system/database of your choosing.
- **Promote from Dev to Test** — Use this request to promote your development package from your Development Environment to your Test Environment.
- **Promote to Preview** — Use this request to promote your development package from your Development Environment to your Preview Environment.
- **Promote to Production** — Use this request to either promote a database or your development package to your Production Environment.

Additional changes may follow after 6/25/18.

Costpoint

Accounting

Change in Default Account Order and New Section on Import Cash Receipts Screen

The Import Cash Receipts application has been updated so users have three default options for Cash Accounts: customer default, screen default, or accounts receivable default. This is made possible by adding a new section: **Cash Account Used When no Customer Default Exists**.

If no customer default is found, the user-provided option field **Cash Account** from the Import Cash Receipts application will be used. If no values are found for these fields, the default Cash Receipt Cash Account from the Configure Accounts Receivable Settings application will be used.

Remove Validation in Amount Fields in Rows

The Manage Non-Project Beginning Balances (GLMBEGIN) and the Manage Project Beginning Balances (GLMPJBEG) applications now allows zero values in the amount fields of the Transactional Currency Beginning Balances subtask. In this way, you can enter or update the amount fields for both transactional and functional and make them zero. This also allows you to correctly adjust the account beginning balances in transaction currency amount in cases where the transactional currency becomes zero, and the only balances are a functional balance for that currency.

In addition, you can now use USD as transactional currency when the functional currency is USD. The validation that requires a transaction currency before a functional currency row has been removed as well.

The system will still require that the Beginning Balance Amounts in the Transactional Currency Beginning Balances is the same with the amounts in the Account/Organization Details subtask.

Update Beginning Balances to Roll a Row for Currency Balances

The Update General Ledger Beginning Balances (GLPUPBB) application has been modified that will update beginning balances to roll a row in Currency Balances when only a row for the functional currency exists in the General Ledger.

This will allow reporting of the beginning balance in both transactional and functional currencies from a single table when the multicurrency setting is on.

Projects

Contract Management

Costpoint now provides additional contract management capabilities through the new Contract Management module available in the Projects domain. With this module, you can:

- Track opportunities within Costpoint and use this information to initiate a contract or a project.
- Track bid and proposal costs from the opportunity to a Costpoint project.
- Track organizational conflicts of interest (OCIs) and link them to opportunities, contracts, and/or projects.
- Manage contract or flow-down clauses between prime contractors and subcontractors.
- Manage customer, vendor, and employee information.
- Streamline the project initialization process.
- Track information from the beginning of the opportunity through contract closeout.

You can manually add opportunities to this module or import opportunity data from GovWin IQ.



In this limited availability (LA) release, the functionality to import opportunities from GovWin IQ is not yet available. GovWin IQ integration for Contract Management together with the new Import GovWin IQ Data screen will be rolled out in the general availability (GA) release.

Once you win the opportunity, you can create a contract and link it to the opportunity. You have the option to associate the contract to a Costpoint opportunity, and also create a contract for an opportunity that does not exist in your Costpoint database. You can create and monitor subcontract information and link subcontract records to contracts and projects.

Within the opportunities, contracts, and and/or subcontracts screen, you have the ability to:

- Add activities and documents related to the opportunity, contract, and/or subcontract.
- Identify employees and other team members who will be working on the opportunity, contract, and/or subcontract.
- Create and/or update contract/subcontract modifications.
- Initialize projects to include information that already exists in the Contract Management module.
- View projects linked to the opportunity, contract, and/or subcontract.
- View and print a project status report (PSR)

Screens that you can use to set up and maintain overall settings for Contract Management are also available in this module.



For an overview demonstration of this feature, refer to Costpoint 7.1.1 Contract Management Overview video, which you can view at

<https://help.deltek.com/Product/Costpoint/USS/Projects/ContractManagementOverview> .

Post Revenue: Include Zero Revenue Amounts Default Changed

The **Include Zero Revenue Amounts** check box on this screen is now selected by default to ensure Costpoint picks up project that have year-to-date revenue amounts of zero. Previously, this check box was cleared and you had to select it to include zero revenue amounts in the posting.

The functionality remains the same. If you clear this check box, the total revenue amounts in the project ledger are zero, and the general ledger is not updated.

GovWin IQ Integration

The Costpoint Contract Management module now allows you to import opportunity records from GovWin IQ into Costpoint. You can run this process from the new Import GovWin IQ Data screen which is located in the Contract Management Interfaces menu. This new screen also allows you to create stored parameters for running the import process at a scheduled time using the Costpoint Job Management applications.

When you run the integration, the following occurs:

- The application imports opportunities from GovWin IQ that do not yet exist in the OPP_MASTER table for the targeted companies and selected login accounts, and then it populates specific information on the opportunity record and on the GovWin IQ subtask for the record. New records are included each time the integration runs.
- If more than one company has the same Tenant ID (GovWin Login Alias or Location Code), any record marked for download creates a new opportunity in each company with that Tenant ID. For example, when one Tenant ID is shared by three companies, then a single opportunity is marked for download in GovWin IQ, and the import process creates a separate opportunity in each of those three companies.
- After the import process runs, you will be able to view the imported opportunities on the Manage Opportunities screen with details on the GovWin IQ subtask.

- The application also updates the existing GovWin IQ subtask information for specified opportunities/companies where there is a GovWin IQ ID on the record. This includes Manual/User entered opportunity records for which a GovWin IQ ID has been manually entered.
- Running the process adds information to the log files which are used for tracking import/ export activity. These logs display on the View Interface Execution Status History screen.

Configure Contract Management Settings (CTMSETNG)

A new check box, **Allow any GovWin IQ login Account to run Import GovWin IQ Data for all login Accounts/companies**, was added to the Corporate Settings subtask of this screen. Select this check box to allow any GovWin IQ login account to run the Import GovWin IQ Data process for all login accounts/companies. Once selected, the **Current Account** and **All Accounts** options on the Import GovWin IQ Data screen are available for selection. If not selected, only **Current Account** is enabled and selected by default.

Configure Opportunity Settings (CTMOPSET)

A new field, **GovWin IQ Login Alias (Tenant ID)**, was added to this screen. Use this field to enter the tenant ID that contains the login information that you will use for importing opportunities from GovWin IQ.

Import GovWin IQ Data (CTPIQDAT)

The new Import GovWin IQ Data screen allows you to transfer selected opportunities from GovWin IQ and into Costpoint. From this screen, you will be able to either run the import process immediately or create stored parameters for scheduled imports. This screen is located in the Contract Management Interfaces menu (**Projects » Contract Management » Contract Management Interfaces**).

Manage Opportunities (CTMOPP)

The new GovWin IQ subtask on this screen allows you to view detailed information about the opportunities imported from GovWin IQ or opportunities that are manually entered in Manage Opportunities and have a corresponding GovWin IQ opportunity ID. It also enables you to run the integration routine to GovWin IQ for a specific opportunity record.

This subtask provides more subtasks where you can view opportunity milestone dates and key contacts as transferred from GovWin IQ, as well as information on employees who marked opportunities in GovWin IQ for import into Costpoint.

Manage System Integration Accounts (SYMINTGR)

A new subtask, GovWin IQ Integration, was added to this screen to allow you to reset the user name and/or password used for the connection between Costpoint and GovWin IQ.

GovWin IQ Integration Connection Settings

After applying the hot fixes and files for integration, new and existing users must enter the proper connection settings in the Costpoint 7.1.1 Configuration Utility to enable integration using GovWin IQ web services.



For more information on using the Costpoint Configuration Utility application, please refer to the *Deltek Costpoint 7.1.1 Configuration Utility* guide.

To configure the Costpoint – GovWin IQ Integration connection settings, complete the following steps:

1. On your Costpoint application server, click **Start » All Programs » Costpoint 7.1.1 » Start Costpoint 7.1.1 Config Utility**.
2. On the Select Your Configuration Options screen, make sure the Product Application Configuration check box is selected and click **Next**. The check box is selected by default.
3. Click **System Integrations tab » GovWin IQ tab**, and enter the connection settings for the Costpoint to GovWin IQ Integration:

Option	Description
Use GovWin IQ Integration	Select this check box to enable integration with GovWin IQ and to enable the rest of the fields
Client ID	Enter the Client ID provided by GovWin IQ.
Client Secret	Enter the Client Secret provided by GovWin IQ.
Connection Timeout (in sec)	The default value is 60 seconds. This indicates the amount of time Costpoint will wait for GovWin IQ to respond during a connection.
Request Timeout (sec)	The default value is 3600 seconds. This indicates the amount of time Costpoint will wait for GovWin IQ to respond when transferring data.
Tenants	<p>Add: Click this button and enter a Tenant ID.</p> <p>User: Enter the GovWin IQ user associated with the selected Tenant ID.</p> <p>Password: Enter the GovWin IQ password for the user associated with the selected Tenant ID.</p> <p>Test: Click this button to test the connection to GovWin IQ using the User and Password associated with the selected Tenant ID.</p> <p>Delete: Click this button to delete the selected Tenant ID.</p>

- Click **Test** to check if the connection settings are correct.
- Restart all WebLogic server or run the Rebuild Global Settings screen in Costpoint to allow the changes to take effect.

Store Supplier/Vendor Rating by Date Reviewed

Costpoint provides you the ability to store supplier/vendor evaluation and rating by date reviewed since the rating and evaluation can change over time. Previously, only one rating can be stored per supplier/vendor. The Manage Contracts and Manage Subcontracts applications are being updated for this enhancement.

Add Skills, Trainings, and Certifications to Prospective Vendors

The Manage Contract Management Vendor Info screen is being enhanced so users can link skills, trainings, and certifications to prospective vendors, and be able to determine which resources meet the skill level, certification, or educational requirements needed.

Export Project Work Force to Deltek Talent Management

You can now export project data from Costpoint to Deltek Talent Management. This enhancement reduces the need for re-entering or duplicating project information (including project ID, project description, and the associated employee work force) in Talent Management. You can use this information in Talent Management to create project employee groups and track project employee performance.



You can use the Transfer Talent Management Data screen available in the People domain to specify other information that you want to import from or export to Talent Management.

The following applications have been modified to support this enhancement.

Manage Project User Flow (PJMBASIC)

Costpoint

In the **Charging** group box of the Basic Info tab, the following check boxes are now available:

- **Export Project Work Force to Talent** — Select this check box to flag the project for transfer to Deltek Talent Management. A process in Talent Management will pull project details, including employee work force, from Costpoint for records that have this check box selected.
- **Allow Edit** — Select this check box to enable edits of the **Export Project Work Force to Talent** check box at the project's lower-level tasks.

Import Project Master Data (PJPPREP)

This application has been updated to incorporate the new check boxes added to the Manage Project User Flow screen. The input file layout of the PROJ.csv template includes two new columns:

- TLNT_FL
- TLNT_EDIT_FL

Mass Add Project Master Data (PJPMADD)

This screen has been updated to include the values of the new check boxes added to Manage Project User Flow when mass adding or updating projects.

Update Prior Year History (PJPUPLY)

This screen now includes the values of the new check boxes added to the Manage Project User Flow when updating prior year history for a project if the **Copy Project Setup Data to History Tables** check box is selected on this screen.

Compute Revenue (PJPCOMPR)

The new check boxes in Manage Project User Flow are now included in the audit history (PROJ_ADT) table. Compute Revenue has been updated to correctly populate these fields in the table if the **Track Revenue Setup Information on Compute Revenue** check box is selected on the Configure Project Settings screen.

Include Project End Date on the Unbilled Analysis Report

Costpoint now allows you to include the project end date on the Unbilled Analysis Report (Summary Report and Detail Report) so you can compare the billed amounts with the end of the project and better determine risk situations that need to be addressed.

The Print Unbilled Analysis Report application has been updated for this enhancement. This screen now has the following new options:

- **Summary Report Column Options (Select 2 of 3)** — Use this new group box to specify the information that you want to include on the Summary Report. You can select up to two of the following three options: **Project End Date**, **Project Type**, and **Project Account Group**. Project Type and Project Account Group are selected by default, but can be modified. When you select **Project End Date**, the other two options are automatically cleared, and you can select either option.

If you already selected **Project Type** in the **Select By** drop-down list, **Project Type** in this group box is automatically cleared and disabled. Similarly, if you selected **Project Account Group** in **Select By**, **Project Account Group** in this group box is automatically cleared and disabled.

- **Detail Report Column Options** — Use this new group box to specify the information that you want to include on the Detail Report. **Project Type** is selected by default, but you can change it to **Project End Date**. You can select only one option.

If you already selected **Project Type** in the **Select By** drop-down list, **Project Type** in this group box is automatically cleared and disabled, and the default selection becomes **Project End Date**.

People

Allow HSA Account Selection in Direct Deposit

Costpoint now provides the functionality for Employee Self Service administrators to enable or disable the Health Savings Account (HSA) account selection on Direct Deposit screens. The following screens contain corresponding updates to support this enhancement:

Direct Deposit (ESMDIRDEP)

If you select the **Allow HSA Account Selection in Direct Deposit** check box on the Manage Taxable Entity Settings screen, the **Usage** drop-down list will be enabled and employees could designate if the bank account is for either Payroll deposit or HSA deposit. If the field is not enabled, the selection will default to Payroll deposit.

Life Events/New Hires (ESMLIFEEVENT)

If you select the **Allow HSA Account Selection in Direct Deposit** check box on the Manage Taxable Entity Settings screen, the **Usage** drop-down list on the Direct Deposit tab will be enabled and employees could designate if the bank account is for either Payroll deposit or HSA deposit. If the field is not enabled, the selection will default to Payroll deposit.

Manage Taxable Entity Settings (AOMESSCS)

A new check box, **Allow HSA Account Selection in Direct Deposit**, determines if the **Usage** drop-down list will be enabled on the Direct Deposit screen and on the Direct Deposit tab of the Life Events/New Hires screen. If this functionality is enabled, employees will be able to designate if a bank account is for Payroll deposit or HSA deposit.

Override Tax ID in the Company Identification in ACH Bank File

This enhancement accommodates the ACH bank file issue of Companies with subsidiaries that are under one taxable entity. Companies with this setup can use this enhancement if they want to distinguish the bank files for the main company's direct deposit and each of the subsidiaries direct deposit.

For this purpose, the Create ACH Bank File screen now allows you to override the Taxable Entity's tax ID and enter a Company Identification. The Create ACH Bank File screen contains the following new check box and field:

- **Override Tax ID in the Company Identification Field (Record) 5** — Select this check box to substitute the Tax ID in Record 5 with the specified Company Identification.
- **Company Identification** — Enter the Company Identification for Position 41 - 50 in the Company/Batch Header Record.

Regulatory and Compliance

2018 North Dakota Withholding Tax

North Dakota released updated withholding tax tables. This enhancement updates the Manage State Taxes and Manage State Tax Tables so that taxes can be calculated accurately for North Dakota in Payroll.

State filing Status of Exempt

This enhancement adds an "Exempt" State filing status which allows recording of taxable wages without withholding taxes during payroll computation.

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If you select the **Allow HSA Account Selection in Direct Deposit** check box on the Manage Taxable Entity Settings screen, the **Usage** drop-down list on the Direct Deposit tab will be enabled and employees could designate if the bank account is for either Payroll deposit or HSA deposit. If the field is not enabled, the selection will default to Payroll deposit.

Known Issues

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

Benefits Enrollment (ESMBENENROLL)

Deltek Defect Tracking Number: 894777

Description: An information message which instructs you to enter an HSA direct deposit account displays for all users when an HSA is elected. This message should display conditionally based on the new Allow HSA Account Selection in Direct Deposit check box on the Configure Taxable Entity Settings screen.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: The following message should only display if the Allow HSA Account Selection in Direct Deposit check box is selected: "You must enter direct deposit information for the HSA Account in 'Payroll and Benefit/manage Direct Deposit' before confirming your selections."

Life Events/New Hires (ESMLIFEEVENT)

Deltek Defect Tracking Number: 894531

Description: The application does not display an error message when confirming a Life Event with no Direct Deposit record but have HSA elections.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: The following error message should display in this scenario: "A direct deposit account with a Usage type of 'HSA' must be entered when an HSA is elected and deposited through direct deposit. The account must be active and the method must be 'Percent'."

West Virginia W-2 Electronic Filing

West Virginia now requires RV record containing IT-103 information in its EFW2 file format for tax year 2017. This Costpoint release includes updates to the Create State W-2 File screen to allow you to comply with the latest W-2 reporting requirement of West Virginia.

2018 Federal Tax Table Updates

This Costpoint release updates the Affordable Care Act (ACA) data for payroll year 2018 and it also corrects both 2017 and 2016 data on the Manage Federal Taxes screen. This update is required in order to create an accurate ACA report.

The following are the updated 2018 Federal taxes and the correct data for 2017 and 2016:

	2018	2017	2016
Federal Poverty Level	\$12,140	\$12,060	\$11,880
Safe Harbor Affordability Rate	9.56%	9.69%	9.66%

Note: For more information, please see the following references:

<https://aspe.hhs.gov/prior-hhs-poverty-guidelines-and-federal-register-references>

<https://www.irs.gov/pub/irs-drop/rp-17-36.pdf>

Louisiana

The Louisiana Department of Revenue (LDR) updated the state's income tax withholding tables to account for changes in federal tax law passed by the U.S. Congress late last year. LDR issued an emergency rule to ensure that employers are withholding the correct amount of state income taxes from employee paychecks. Louisiana tax rates for all filing statuses have changed.

This Costpoint release applies updates to Manage State Tax Withholding Adjustments screen and Manage State Tax Tables screen so that taxes will be calculated accurately for Louisiana payroll

North Dakota Withholding Tax

The North Dakota percentage method withholding tables were released by the State and the following are the updates to North Dakota withholding tax:

- The annual withholding tables for Single and Married have been updated.
- The amount of one withholding allowance increases from \$4,050 to **\$4,150**.

This Costpoint release updates the Manage State Taxes screen and Manage State Tax Tables screen for the accurate calculation of taxes for this State in Payroll.

Michigan Withholding Tax

The state of Michigan restored personal exemption as it existed before the 2017 federal tax code overhaul and increased it from \$4,000 to **\$4,050**.

This Costpoint release updates the Manage State Taxes screen for the accurate calculation of taxes for this State in Payroll.

Oregon

Oregon revised its withholding tax formulas effective February 1, 2018. The following are the tax updates for Oregon:

- The federal tax adjustment amount increases from \$6,550 to **\$6,650** for an employee with annual wages up to \$50,000.
- The federal tax adjustment phase out amounts changed in 2018 for an employee with annual wages of 50,000 or greater.

Costpoint

- The tax table changed for an employee with annual wages up to \$50,000.
- The tax table changed for an employee with annual wages of \$50,000 or greater.
- The allowance amount increases from \$197 to **\$201**.
- The standard deduction amount increases from \$2,175 to **\$2,215** for an employee filing "Single" with fewer than 3 allowances.
- The standard deduction amount increases from \$4,350 to **\$4,435** for an employee filing "Single" with more than 3 allowances.
- The standard deduction amount increases from \$4,350 to **\$4,435** for an employee filing "Married."

Virgin Islands

The following are the tax updates for Virgin Islands.

- The unemployment-taxable wage increases from \$23,500 to **\$24,200**.
- State tax tables were updated based from 2018 Federal tax tables.

March SUTA Electronic Filing Updates

Missouri

Costpoint now provides the ability to report employees as officers of the corporation in the ICESA file format of Missouri's SUTA electronic filing. To accurately report officers in the SUTA tax file of Missouri, you must flag Missouri employees as an **Owner** on the Manage Employee Taxes screen. The employees will then be reported as officers when you create the Missouri SUTA tax file.

This release updates the Create Quarterly SUTA Tax File (PRPSMM) screen for Missouri SUTA Electronic Filing. When creating Missouri SUTA tax files, the application populates the **Officer Code** (S Record - Position 210) field based on the **Owner** check box on Tax Reporting Information tab of the Manage Employee Taxes screen.

The updates to Manage Employee Taxes (PRMETAX) screen for this feature will be released separately.

Kentucky

The Create Quarterly SUTA Tax File screen now reports excess wages in the S Record of Kentucky's ICESA file format. When creating the Kentucky SUTA tax file, the application will populate position 78-91 of the S Record with the employee's excess wages for the reported quarter.

Missouri SUTA Electronic Filing

Costpoint now provides the ability to report employees as officers of the corporation in the ICESA file format of Missouri's SUTA electronic filing. To accurately report officers in the SUTA tax file of Missouri, you must flag Missouri employees as an **Owner** on the Manage Employee Taxes screen. The employees will then be reported as officers when you create the Missouri SUTA tax file.

Manage Employee Taxes (PRMETAX)

This release includes the following updates to the Manage Employee Taxes screen:

- You can now select the **Owner** check box under the **D.C., Massachusetts, Michigan, Missouri, New Mexico, Washington** label on Tax Reporting Information tab to report employees as officers when you create SUTA tax file of Missouri.
- The **Owner** check box label now indicates the State of Missouri.

Note: The updates to the Create Quarterly SUTA Tax File (PRPSMM) screen for this feature was released separately (Mid-March 2018).

Updated Personal Allowances Information in 2018 Form W-4

This Costpoint release updates the Personal Allowances information in the Allowances Worksheet to match the information from the 2018 Form W-4.

New Information in Personal Allowances Worksheet

The Allowances Worksheet tab, which is used for calculating your total number of allowances in the Federal Withholding (ESMFEDWH) and Life Events/New Hires (ESMLIFEEVENT) screens, now reflects updated Personal Allowances information from the 2018 Form W-4. The following text now display in this tab:

Use this Personal Allowances Worksheet to calculate your Total number of allowances.

1.) Select the appropriate conditions

- ☐ For yourself.
- ☐ If you will file as married filing jointly.
- ☐ If you will file as head of household.
- ☐ If you are single, or married filing separately, and have only one job; or you are married filing jointly, have only one job, and your spouse doesn't work; or your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.

2.) Child tax credit

If your total income will be less than \$69,801 (\$101,401 if married filing jointly), enter "4" for each eligible child.

If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 if married filing jointly), enter "2" for each eligible child.

If your total income will be from \$175,551 to \$200,000 (\$339,001 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 \$69,801 (\$101,401 if married filing jointly), enter "1" for each eligible dependent.

If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 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 higher than \$175,550 (\$339,000 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.

The following Costpoint screens were updated to support this enhancement:

- Federal Withholding (ESMFEDWH)

- Life Events/New Hires (ESMLIVEEVENT)

New York and San Francisco Paid Family Leave

The state of New York and city of San Francisco, California both implemented forms of Paid Family Leave in which eligible employees will receive compensation from their employers for specific leave based on family care.

The New York State Paid Family Leave Program provides New Yorkers job-protected, paid leave to bond with a new child, care for a loved one with a serious health condition or to help relieve family pressures when someone is called to active military service.

The San Francisco Paid Parental Leave Ordinance (SF PPLO) requires employers who have employees working in San Francisco to provide Supplemental Compensation to employees who are receiving California Paid Family Leave (PFL) benefits to bond with a new child, so that the employees receive up to 100% of their normal weekly wages during 6 weeks of parental leave.

If either or both are applicable to your company, the enhancements in this Costpoint release will allow you to comply with the Paid Family Leave requirements

Note: The information in this section is taken from the New York state website. For more information, please see:

- New York Paid Leave: <https://www.ny.gov/new-york-state-paid-family-leave/new-york-state-paid-family-leave-employers>.
 - San Francisco Paid Parental Leave Ordinance (PPLO): <https://sfgov.org/olse/sites/default/files/FAQ%20March%202017.pdf>
-

New York Paid Family Leave

Nearly all private employees in New York State will be eligible for Paid Family Leave. Insurance coverage for Paid Family Leave must be available to employees beginning January 1, 2018, and generally will be included under an employer's existing disability benefits policy.

Paid Family Leave coverage is funded by employee payroll contributions.

Public employers may opt into the program. Public employees represented by a union may be covered if Paid Family Leave is collectively bargained.

Employees are guaranteed:

- Wage replacement for 8 weeks in 2018, increasing to 12 weeks by 2021;
- Job protection upon return from Paid Family Leave; and
- Continuation of health insurance while out on Paid Family Leave.

New York Paid Family Leave – Employee Payroll Contributions

Paid Family Leave coverage is funded by employee payroll contributions. Use the ny.gov/pfcalculator to get an estimate of an employee's weekly deduction.

The 2018 payroll contribution is 0.126% of an employee's weekly wage and is capped at an annual maximum of \$85.56. If an employee earns less than the New York State Average Weekly Wage (\$1305.92 per week), they will have an annual contribution amount less than the cap of \$85.56, consistent with their actual weekly wages.

For example, in 2018, if an employee earns \$27,000 a year (\$519 a week), they will pay 65 cents per week.

The employee contributions that are withheld for Paid Family Leave are to be used to pay for the insurance.

Deductions and Employee Deductions Setup for New York Paid Family Leave

Apply the following Deductions and Employee Deductions setup for New York Paid Family Leave:

1. On the Manage Deductions (PRMDED) screen, set up a Deduction with the following settings to be used to deduct the New York Paid Family Leave employee contribution:
 - **Deduction Type** — MISC
 - **Deduction** — Select this check box.
 - **Computation Method** — FIXAMT
 - **Amount** — This value will need to be set at the employee level since it's based on a percentage of each employee's average weekly wage, which can vary by employee. However, if most of your employees have an average weekly wage that is greater than 1,305.92 and have the same pay frequency, you may want to enter this value as follows to alleviate some data entry at the employee level:
 - If the pay frequency is 'Weekly' for most employees then populate this field with 1.65 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Weekly')
 - If the pay frequency is 'Bi-Weekly' for most employees then populate this field with 3.30 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Bi- Weekly')
 - If the pay frequency is 'Semi-Monthly' for most employees then populate this field with 3.575 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Semi-Monthly')
 - If the pay frequency is 'Monthly' for most employees then populate this field with 7.15 (Note that you will need to override this value for any employees that don't have an average weekly wage greater than 1,305.92 and/or have a pay frequency that is not 'Monthly')
 - **Ceiling Method** — Payroll Year
 - **Ceiling Amount** — 85.80
 - **W-2 Box 14 Usage** — Set this value so the amount will be included in Box 14 of the W-2.
 - Enter other required data.
2. On the Manage Employee Deductions (PRMEDED) screen, set up an Employee Deductions record with following settings for each affected employee:
 - **Deduction** — New York Paid Family Leave Deduction
 - **Method** — FIXAMT
 - **Rate** — Use the following guidelines:
 - If the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Weekly' then populate this field with 1.65
 - Else, if the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Bi-Weekly' then populate this field with 3.30
 - Else, if the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Semi-Monthly' then populate this field with 3.575
 - Else, if the employee's Average Weekly Wage is **greater** than 1,305.92 and the employee's pay frequency is 'Monthly' then populate this field with 7.15
 - Else, if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Weekly' then populate this field with the result of this calculation:

Employee's Average Weekly Wage x 0.126%

- Else, if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Bi-Weekly' then populate this field with the result of this calculation:

$$((\text{Employee's Average Weekly Wage} \times 0.126\%) \times 52) / 26$$

- Else, if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Semi-Monthly' then populate this field with the result of this calculation:

$$((\text{Employee's Average Weekly Wage} \times 0.126\%) \times 52) / 24$$

- Else if the employee's Average Weekly Wage is **less** than 1,305.92 and the employee's pay frequency is 'Monthly' then populate this field with the result of this calculation:

$$((\text{Employee's Average Weekly Wage} \times 0.126\%) \times 52) / 12$$

- **Limit:** 85.80
- **Start Date:** Set, if needed
- **End Date:** Set, if needed

Employee and Leave Setup for New York Paid Family Leave

Apply the following Employee and Leave settings for New York Paid Family Leave:

1. Ensure the **Allow Overtime for Salaried, FLSA Exempt Employees** check box is selected in Configure Labor Settings. In order to use this functionality, you will need to use an Overtime pay type to pay salaried, exempt employees.

If the check box is already selected, proceed to the next step. If the check box is not already selected, select the box, save the record, and then run the Rebuild Global Settings (SYPSTNG) application for the Labor module.
2. Set up a pay type to be used for New York Paid Family Leave with the following settings:
 - **Factor** — 1
 - **Additional Calculation Based on an Amount** group box
 - **Select the Add pay type amount to timesheet line** — Select this option.
 - **Amount** — 0.00
 - Pay Type Categories group box
 - **Overtime** — Select this check box
 - **Exclude from Salary Caps** — Select this check box.
 - **Employee Eligibility** group box
 - **Exempt** — Select this check box.
 - **Non-Exempt check box** — Select this check box.
 - **Salaried check box** — Select this check box.
 - **Overtime Premium Recasting** group box
 - **Eligible for overtime premium recasting** — Clear this check box.
 - **Allocate Compensate Overtime** group box
 - **Calculate overtime premium on this pay type** — Clear this check box.
 - **Allocate overtime premium to this pay type** — Clear this check box.
 - **Weighted Averages** – Not applicable

3. Set up a leave type to be used for New York Paid Family Leave (Expense Account only) and flag as Paid Family Leave.
 - **Use for Paid Family Leave** – Select this check box.
 - **Balance Ceiling Method** – No Ceiling
 - **Pay Balance Upon Termination** — Clear this check box.
 - **Leave Balance Floor** — 0.00
 - **Floor Edit Method** — Error
4. Set up a leave code to be used for New York Paid Family Leave.
 - **Leave Type** — Select the leave type that you set up for New York Paid Family Leave (step #3).
 - **Include Negative Balances in Leave Year Carryover** – Clear this check box.
 - **Report Leave to Employee in Days** — Clear this check box.
 - **Basis for Leave Deferral** group box
 - **Leave Hire Date** — Select this option.
 - **Days to Defer Leave Usage** — 0
 - **Leave Modifier** — This field should be blank.
 - **Base Hours worked on Eligible Labor Locations** — Clear this check box.
 - **Leave Table Details**
 - **Months of Service** — 0
 - **Compute Method** — F-Block Grant on Paid Family Leave Date
 - **Unit of Hours** — 0
 - **Annual (C) Block Grant Date** — This field should be blank.
 - **One-Time (D) Block Grant Date** — This field should be blank.
 - **Accrual Rate** — Populate with the average number of hours the employee worked per week during the PPL.
5. Assign the leave type to the employee.
 - **Family Paid Leave Information** — This is required because the Compute Method is F-Block Grant on Paid Family Leave Date.
 - **Paid Family Leave Date/Satisfaction of Preconditions Date** — *Supplemental Compensation should be paid on the payday for the next full pay period following the employee's satisfaction of all preconditions.
 - **EDD Maximum Benefit Amount** — The amount EDD pays to the EE. From EDD Notice of Computation.
 - **EDD Weekly Benefit Amount** — The amount EDD pays to the EE. From EDD Notice of Computation.
 - **EDD Daily Benefit Amount** — The amount EDD pays to the EE. From EDD Notice of Computation.
 - **EDD Claim Effective Date** — From EDD Notice of Computation.
 - **Employee's Normal Weekly Wage** — If greater than the CA Maximum Weekly Benefit Amount, then replace with the CA Maximum Weekly Benefit Amount.
 - **Weekly Supplemental Compensation Amount** — This is equal to: Normal Weekly Wage – EDD Weekly Benefit Amount
 - **Average number of hours that employee worked per week during the PPLO Lookback Period** — This will be used to determine the Hourly Supplemental Compensation.

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- **Hourly Supplemental Compensation Amount** — $\text{Weekly Supplemental Compensation Amount} / \text{Average Number of Hours per Week}$.
- **EE's Normal Daily Wage** — This is equal to: $\text{EE's Normal Weekly Wage} / \text{Days per Week}$
- **Pay Period Compensation Amount** — This is equal to: $(\text{Weekly Supplemental Compensation Amount} \times 52) / \text{Pay Period Frequency}$
- **End Date of Leave** — The last day the employee can use the paid family leave.

San Francisco PPLO Processing

San Francisco employers will be responsible for the completing the following steps in Costpoint:

1. On the Manage Leave Types screen, set up a leave type to be used for San Francisco Employer- Funded Paid Parental Leave.

Under the SF PPLO, employers are required to provide employees receiving state PFL for new child bonding with "Supplemental Compensation" equal to the difference between the employee's PFL benefit amount and the employee's normal gross weekly wages such that the employee receives up to 100% of their weekly wages, subject to a weekly maximum benefit amount, for up to 6 weeks. Select the **Use for Paid Family Leave** check box if you are not paying the employee his/her full wages for the leave.
2. On the Manage Leave Codes screen, set up a leave code to be used for San Francisco Employer-Funded Paid Parental Leave. If the specified leave type's **Use for Paid Family Leave** check box is selected in Manage Leave Types, the **Compute Method** will default to **F-Block Grant on Paid Family Leave Accrual Date** and you will not be able to use any other Compute Method.
3. Determine the employee's eligibility for coverage
4. Determine the following values in order to calculate an Hourly Supplemental Compensation Amount (This would come from the **Notice of Computation** from the State EDD):
 - EDD Maximum Benefit Amount (currently 2133.00)
 - Employee's Normal Weekly Wage (up to limit of EDD Maximum Benefit Amount)
 - EDD Weekly Benefit Amount (from EDD Notice of Computation)
 - SF PPLO Supplemental Compensation Limit (currently \$960 (45% of 2133.00))
 - Multiple Employer flag
 - Normal Weekly Wage from other Employer(s)
 - Average number of hours that employee worked per week during the PPLO Lookback Period (will be used to determine the Hourly Supplemental Compensation)
 - Weeks Covered by Year (currently 6 weeks)
5. Calculate the Hourly Supplemental Compensation Amount
 $\text{EE Normal Gross Weekly Wage for this Employer} = \text{Determine the employee's average weekly wage}$
 - If weekly wages are constant then use the amount for the week immediately preceding the leave period
 - If weekly wages are not constant, they must be calculated based on the Paid Parental Leave lookback period. The lookback period is defined as "immediately preceding the start of the employee's California [Dec 2016 Rev] Paid Family Leave Period (or immediately preceding pregnancy disability leave for women transitioning directly to Paid Family Leave)." The period contains six bi-weekly or semi-monthly, or 12 weekly pay periods and is codified at 3300H.4(b)1(B).

Note: For more information, please see: <http://sfgov.org/olse/PAID-PARENTAL-LEAVE-CALCULATIONS>.

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6. On the Manage Employee Leave screen, assign the company's San Francisco Paid Family Leave - leave type and leave code to the employee.

Note: The Leave Hire Date must be set to the effective date of the Paid Family Leave.

7. Compute and post leave for the employee to give the employee the block grant.
8. To charge Paid Family Leave on a timesheet, the employee must do the following:
 - Use the leave type's account (Accrual Account if the leave was accrued and posted to the GL as a liability or use the Expense Account if used Paid Family Leave is expensed)
 - Use the appropriate pay type on the timesheet so that the correct rules are applied
9. Before posting timesheets, run the Apply Timesheet Adjustments in Batch Mode (LDPAUTO) utility for Paid Family Leave so that the appropriate labor cost adjustments are made to the timesheets.
10. If you want to reverse the Paid Family Leave adjustments on timesheets that have not yet been posted or processed for leave or payroll, complete the following steps:
 - Select the **Reverse Paid Family Leave** option on the Apply Timesheet Adjustments in Batch Mode screen.
 - On the **Selection Ranges** group box, select the timesheets which need to be processed
 - Print the Apply Timesheet Adjustments in Batch Mode report
 - Process.

Screen Updates

Import Timesheets (AOPUTLTS)

When the application adds a timesheet line to an existing timesheet that has at least one existing Paid Family Leave timesheet line, the application will not auto-adjust the timesheet. Validations for the following were added to the application:

- To prevent entry or import of a timesheet where at least one of the timesheet lines has a timesheet line date that is not within the employee's Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is less than the employee's Paid Family Leave period.
- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is less than the employee's Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.

For example, an employee has the following:

- Paid Family Leave period is 01/01/2018 to 04/13/18.
- Timesheet frequency is semi-monthly.

A timesheet is entered or imported in April 2018 with a date of 04/15/18, but no timesheet line dates to indicate what day each charge was incurred. Without timesheet line dates, Costpoint will assume the timesheet includes the entire timesheet period. Therefore, it will assume the timesheet may include hours charged between 04/01/18 and 04/13/18 (the last 13 days of the employee's Paid Family Leave period).

Therefore, any charges to Paid Family Leave within this timesheet will pass validation.

- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.

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- To prevent users from charging hours to an Account that's linked to a Paid Family Leave - leave type if the pay type does not have the following setup in the **Manage Pay Types** screen:
 - **Factor** — 1
 - **Additional Amount** — 0.00
 - **Overtime check box** — Unchecked
 - **Cost-only check box** — Unchecked
 - **Leave Without Pay (LWOP) check box** — Unchecked
 - **Leave Without Pay (LWOP) Negative check box** — Unchecked
 - **Severance check box** — Unchecked
 - **Eligible for overtime premium recasting check box** — Unchecked
 - **Allocate overtime premium to this Pay Type check box**: Unchecked
 - **Weighted Averages option** — Not Applicable (do not include or recalculate) option

Manage Timesheets (LDMTIME)/Manage Correcting Timesheets (LDMCTIME)

The Manage Timesheets and Manage Correcting Timesheet screens have new validations to prevent adjustments and changes on certain fields if the timesheet has been adjusted for Paid Family Leave.

Note: If you need to adjust the labor cost on a timesheet line that charges Paid Family Leave, use Apply Timesheet Adjustments in Batch Mode to reverse the Paid Family Leave adjustments. After reversing, you may edit the timesheet.

The applications were updated so that when adding a timesheet line to an existing timesheet and that existing timesheet has already has at least one Paid Family Leave timesheet line, the applications will not auto-adjust the timesheet.

Validations were also added to the screen for the following:

- To prevent entry or import of a timesheet where at least one of the timesheet lines has a timesheet line date that is not within the employee's Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is less than the employee's Paid Family Leave period.
- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is less than the employee's Paid Family Leave period.
- To prevent entry or import of a timesheet where there are no timesheet line dates and the timesheet date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.

For example, an employee has the following set up:

- Paid Family Leave period is 01/01/2018 to 04/13/18.
- Timesheet frequency is semi-monthly.

A timesheet is entered or imported in April 2018 with a date of 04/15/18, but no timesheet line dates to indicate what day each charge was incurred. Without timesheet line dates, Costpoint will assume the timesheet includes the entire timesheet period. Therefore, it will assume the timesheet may include hours charged between 04/01/18 and 04/13/18 (the last 13 days of the employee's Paid Family Leave period).

Therefore, any charges to Paid Family Leave within this timesheet will pass validation.

- To prevent entry or import of a C-Correcting or D-Correcting timesheet where there are no timesheet line dates and the Reference Date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.
- To prevent users from charging hours to an Account that's linked to a Paid Family Leave - leave type if the pay type does not have the following setup the **Manage Pay Types** screen:
 - **Factor** — 1
 - **Additional Amount** — 0.00
 - **Overtime check box** — Unchecked

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- **Cost-only check box** — Unchecked
- **Leave Without Pay (LWOP) check box** — Unchecked
- **Leave Without Pay (LWOP) Negative check box** — Unchecked
- **Severance check box** — Unchecked
- **Eligible for overtime premium recasting check box** — Unchecked
- **Allocate overtime premium to this Pay Type check box** — Unchecked
- **Weighted Averages option** — Not Applicable (do not include or recalculate)

The screenshot shows the 'Manage Pay Types' window in Deltek Costpoint. The 'Identification' tab is active, displaying the following fields:

- Pay Type Code ***: PFL
- Description ***: Paid Family Leave
- Factor ***: 1.0000

The 'Details' section is divided into several panels:

- Additional Calculations Based on an Amount**:
 - ☒ Add pay type amount to timesheet line
 - ☐ Multiply hours times pay type amount
 - ☐ Multiply hours times pay type amount times factor
 - Amount ***: 0.0000
- Pay Type Categories**:
 - ☐ Overtime
 - ☐ Cost-only
 - ☐ 6 day pay
 - ☐ Leave without pay (LWOP)
 - ☐ Leave without pay (LWOP)-Negative
 - ☐ Severance
 - ☐ Federal-non-taxable sick pay wages
 - ☐ Benefit reimbursement
 - ☐ Exclude from gross earnings (reimbursement)
 - ☐ Exclude from ACA Full-Time Equivalent Analysis
 - ☐ Exclude from Salary Caps
- Employee Eligibility**:
 - ☒ Exempt
 - ☒ Non-Exempt
 - ☒ Salaried
- Overtime Premium Recasting**:
 - ☐ Eligible for overtime premium recasting
 - Recast Pay Type**: [Empty field]
- Allocate Compensated Overtime**:
 - ☐ Calculate overtime premium on this Pay Type
 - ☐ Allocate overtime premium to this Pay Type
- Weighted Averages**:
 - ☐ Include this Pay Type in determining the weighted average
 - ☐ Recalculate this Pay Type
 - ☒ Not applicable (do not include or recalculate)

At the bottom right, there is a link for [Transaction Currency Overrides](#).

Manage Employee Leave (LDMELV)

The following are updates to the Manage Employee Leave screen:

- A new **Used for Paid Family Leave** check box indicates whether the leave type selected is flagged as **Use for Paid Family Leave** on the Manage Leave Types screen.
- A new Paid Family Leave subtask allows you to enter leave charging details that will be used in Paid Family Leave processing. You must enter at least one row in this subtask if the leave type selected is flagged as **Used for Paid Family Leave**. This subtask contains the following fields:
 - **Effective Date** — This is the effective date of the employee's Paid Family Leave period.
 - **End Date** — This is the end date of the employee's Paid Family Leave period.
 - **Accrual Date** — This is the date on which the employee should receive the Paid Family Leave accrual.
 - **Jurisdiction** — This is the city or State which mandated the paid family leave.
 - **Allows Hourly Charging** — This is an information-only field.
 - **Average Weekly Wage** — This is determined by employer based on State/City rules.
 - **Average Weekly Hours** — This is determined by employer based on State/City rules.
 - **Average Hourly Compensation Rate** — Disabled field. This is automatically calculated by dividing the **Average Weekly Wage** by the **Average Weekly Hours**.
 - **Override Accrual Rate** — The accrual rate to be used if the employer needs to override the accrual rate assigned to the leave code. This field is needed since accrual rates can vary from employee-to-employee.

Reconcile Leave Balances (LDPLVREC)

If leave types are flagged as **Use for Paid Family Leave**, the reconciliation process will not include the corresponding employee/leave type.

Apply Timesheet Adjustments in Batch Mode (LDPAUTO)

The **Process Type** group box includes the following options for Paid Family Leave processing:

- **Paid Family Leave** — Select this option to apply labor cost adjustments for hours charged to a **Paid Family Leave** - leave type.
- **Reverse Paid Family Leave** — Select this option to reverse Paid Family Leave adjustments on timesheets within the specified screen parameters.

Close Leave Year (LDPLYCLS)

If you enable the Multicurrency functionality, the application will not process gains and losses for **Paid Family Leave** - leave types.

Compute Leave (LDPCLHF)

The Compute Leave process will now apply the following when processing leave types that are flagged as **Use for Paid Family Leave** on the Manage Leave Types screen:

- If the employee's leave type is flagged as **Use for Paid Family Leave** in Manage Leave Types, the application will only select employee/leave Type for processing if:
 - The employee/leave type combination exists in the Paid Family Leave subtask of the Manage Employee Leave screen.
 - The employee's Paid Family Leave - Accrual Date is between the open leave period's start date and the open leave period's end date
- If Paid Family Leave is being processed, then the Paid Family Leave-Average Hourly Compensation Rate, instead of the employee's Hourly Amount, will be used to determine the Accrual Amount.

Create Retroactive Timesheet Adjustments (LDPRETRO)

The Create Retroactive Timesheet Adjustments processing will not include timesheet lines with accounts that are linked to a leave type that is flagged as **Use for Paid Family Leave**.

Import Timesheets from Deltek Time and Expense (LDPUPET)

The following are updates to the Import Timesheets from Deltek Time and Expense processing:

1. When the application adds a timesheet line to an existing timesheet that has at least one existing Paid Family Leave timesheet line, the application will not auto-adjust the timesheet.
2. The application will prevent users from importing a timesheet where at least one of the timesheet lines is charging Paid Family Leave and a Timesheet Line Date is specified, but the timesheet line date is not within the employee's Paid Family Leave period.
3. The application will prevent users from importing a timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates and the timesheet date is less than the employee's Paid Family Leave period.
4. The application will prevent users from importing a C-Correcting or D-Correcting timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates and the Reference Date is less than the employee's Paid Family Leave period.
5. The application will prevent users from importing a C-Correcting or D-Correcting timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates and the Reference Date.
6. The application will prevent users from importing an R-Regular timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates, and the timesheet date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.

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For example, the employee has the following:

- Paid Family Leave period is 01/01/2018 to 04/13/18.
- Timesheet frequency is semi-monthly.

A timesheet is entered or imported in April 2018 with a date of 04/15/18, but no timesheet line dates to indicate what day each charge was incurred. Without timesheet line dates, Costpoint will assume the timesheet includes the entire timesheet period. Therefore, it will assume the timesheet may include hours charged between 04/01/18 and 04/13/18 (the last 13 days of the employee's Paid Family Leave period).

Therefore, any charges to Paid Family Leave within this timesheet will pass validation.

7. The application will prevent users from importing a C-Correcting or D-Correcting timesheet where at least one of the timesheet lines is charging Paid Family Leave, there are no timesheet line dates, the Reference Date is greater than the employee's Paid Family Leave period start date and does not fall within a timesheet period that overlaps with the Paid Family Leave period.
8. The application now has validations to prevent users from charging hours to an Account that's linked to a Paid Family Leave - leave type if the pay type is not set up as follows in the **Manage Pay Types** screen:
 - **Factor** — 1
 - **Additional Amount** — 0.00
 - **Overtime check box** — Unchecked
 - **Cost-only check box** — Unchecked
 - **Leave Without Pay (LWOP) check box** — Unchecked
 - **Leave Without Pay (LWOP) Negative check box** — Unchecked
 - **Severance check box** — Unchecked
 - **Eligible for overtime premium recasting check box** — Unchecked
 - **Allocate overtime premium to this Pay Type check box** — Unchecked
 - **Weighted Averages option** — Not Applicable (do not include or recalculate)

Browse Applications > People > Labor > Labor Rate Controls > **Manage Pay Types**

Identification: Pay Type Code * **PFL** Description * **Paid Family Leave** Factor * **1.0000**

Details:

Additional Calculations Based on an Amount

- ☒ Add pay type amount to timesheet line
- ☐ Multiply hours times pay type amount
- ☐ Multiply hours times pay type amount times factor

Amount * **0.0000**

Pay Type Categories

- ☐ Overtime
- ☐ Cost-only
- ☐ 6 day pay
- ☐ Leave without pay (LWOP)
- ☐ Leave without pay (LWOP)-Negative
- ☐ Severance
- ☐ Federal-non-taxable sick pay wages
- ☐ Benefit reimbursement
- ☐ Exclude from gross earnings (reimbursement)
- ☐ Exclude from ACA Full-Time Equivalent Analysis
- ☐ Exclude from Salary Caps

Employee Eligibility

- ☒ Exempt
- ☒ Non-Exempt
- ☒ Salaried

Overtime Premium Recasting

- ☐ Eligible for overtime premium recasting

Recast Pay Type:

Allocate Compensated Overtime

- ☐ Calculate overtime premium on this Pay Type
- ☐ Allocate overtime premium to this Pay Type

Weighted Averages

- ☐ Include this Pay Type in determining the weighted average
- ☐ Recalculate this Pay Type
- ☒ Not applicable (do not include or recalculate)

[Transaction Currency Overrides](#)

Manage Leave Codes (LDMLVTAB)

The **Compute Method** drop-down list displays a new option, **F-Block Grant on Paid Family Leave Accrual Date**, which is used specifically for only leave types that are flagged as **Use for Paid Family Leave**.

Manage Leave Types (LDMLVTP)

- A new **Use for Paid Parental/Family Leave** check box in the **Details** group box allows you to indicate that the leave type will be used to track paid family or paid parental leave.
- A new **Paid Family Leave Pay Type** field to the **Details** group box allows you to select the pay type to be used to adjust Paid Family Leave labor cost for Salaried employees.

Post Labor (LDPLDJ)

If you enable the Multicurrency functionality, the application will not process gains and losses for timesheet lines that have been adjusted by or generated for Paid Family Leave.

Ability to Establish Limit for Year to Date (YTD) Leave Accrued Hours/Amount

Executive Order 13706 requires a parties that enter into government contracts with the Federal Government to provide covered employees with up to seven days of paid sick leave annually, including paid leave allowing for family care. To comply with the Executive Order, Costpoint now allows you to establish a limit to the hours/amount that an employee may accrue during the leave year.

The following Costpoint screen were updated to support this enhancement:

Compute Leave Accruals (LDPCLHF)

The application can now apply period-accrual and year-accrual ceilings based on Leave Type's **Accrual Ceiling Method** (in addition to existing period-balance and year-balance ceiling).

Manage Leave Codes (LDMLVTAB)

- The application now allows you to specify a ceiling that will limit the number of hours (or amount for leave types being tracked by amount) an employee may accrue during the leave year. Use the new **Year Accrual Ceiling** field to specify an annual accrual limit.
- The field label changed from "Leave Period Ceiling" to "Period Balance Ceiling."
- The field label changed from "Year Ceiling" to "Year Balance Ceiling."

Manage Leave Types (LDMLVTP)

- You can now whether or not a ceiling should be applied to the number of hours (or amount for leave types being tracked by amount) accrued for a given employee during the leave year and/or a given leave period. For this purpose, the screen provides a new **Accrual Ceiling Method** drop-down list with the following options: **Period and Year**, **Year**, and **No Ceiling**.
- The group box label changed from "Leave Balance Ceilings" to "Leave Ceilings."
- The drop-down list label changed from "Ceiling Method" to "Balance Ceiling Method"
- You can now specify whether the Period and/or Anniversary Leave Year ceiling is applied before or after the period's accrual is calculated. For this purpose, the screen provides the following **Ceiling Timing** group box options: **Before Accrual**, **After Accrual**, and **Not Applicable**.
- You can now specify whether excess leave is tracked as lost leave, transferred to an Excess Leave Type, or neither. For this purpose, the following changes were applied:
- The Balance **Ceiling Method** drop-down list no longer lists the **Lost Leave Tracking** option. The screen now contains a **Track as Lost Leave** check box.

Costpoint

- The screen contains new **Track as Lost Leave** and **Transfer Balance in Excess of Year Ceiling** check boxes for **Excess Leave Handling**.

Materials Management

Standard Costing

This feature enables you to use standard costing methods for inventory valuation. Prior to this feature, only average actual costing method is available in Costpoint.



This enhancement has no impact on current functionality.

The functionalities of this updates/enhancements are not available until the full feature is released.

Standard costing enhancement features the following:

- New secure standard costing tables for item standard cost and project item standard cost
- New application to calculate future standard costs
- New application for purchase price variance (PPV)
- Ability to calculate and post variances for PPV and manufacturing costs (materials, labor, misc 1, misc 2, subcontractor) and corresponding overheads
- Ability to update item preprocessor for new cost tables
- Modified WIP variance process to include breakdowns for average actual and standard costing

Organization Security

Changes were made to the following screens in preparation for the future implementation of the Organization Security feature:

- Update Manufacturing Order Costs (PCMMCOST)
- Print Manufacturing Order Documentation (PCRMODC)
- Create MO Subcontractor Requisitions (PCMSCRQ)
- Manage MO Operations Completions (PCMCOMP)
- Manage MO Quality Control Inspection Results (PCMINSRQ)
- Manage Purchase Orders (POMMAIN)
- Manage Inventory Abbreviation Peggings (MRMIAPEG)

Note: These enhancements have no impact on current functionality. The functionalities of these updates/enhancements are not available until the full feature is released.

This feature ensures that proper user access is applied throughout all Materials applications.

Organization Security enhancement features the following:

- Validation of data entry as authorized for the logged-in user ID
- Filtering of existing records as authorized for the logged-in user ID
- Narrowing the search for records as authorized for the logged-in user ID
- Display of report information is limited to authorized data for the logged-in user ID

Note: The update for the Manage Purchase Orders (POMMAIN) screen requires PATCH3390.

Organization Security – Engineering Change Notices

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Engineering Change Notices (ECN) module. This feature ensures that correct user access is applied to the logged-in user ID in accessing parts and projects.

Organization Security – Procurement Planning

The Organizational Security feature enhances the secure functionality of Costpoint by warranting proper user access throughout the Procurement Planning module. This feature ensures that correct organizational security is applied when a user enters an inventory abbreviation in which the linked project and/or organization are not authorized for the logged-in user/ID.

Manage Simple Purchase Requisitions (PPMQREQ)

The following are the changes to this screen:

- Data Entry
 - User access validation has been modified so that if you enter new data with a requisition type that is linked to projects with an owning organization and/or to organizations that are not authorized for the user ID, Costpoint displays an error message.
 - User access validation has been modified so that if you enter new data with a requisitioner's organization that is not authorized for the user ID, Costpoint displays an error message.
 - User access validation has been modified so that if you link a project (on the Charge Numbers subtask) with a Project's Owning Org (PROJ. ORG_ID), and this is not authorized for the user ID and/or an organization, Costpoint displays an error message.
- Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines whether or not the user ID logged in has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
 - User access validation has been modified so that if you enter a requisitioner's organization that is not authorized for the user ID, Costpoint displays an error message.
 - User access validation has been modified so that if you link a project (on the Charge Numbers subtask - Project's Owning Org (PROJ. ORG_ID)) and/or an organization that is not authorized for the user ID, Costpoint displays an error message.
- Lookup
 - Requisition Type – Costpoint now filters and only displays requisition types that are linked to projects with owning organizations that are authorized for the logged-in user ID.
 - Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.
 - Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Manage Purchase Requisitions (PPMNTRQ1)

The following are the changes to this screen:

Costpoint

- **Data Entry**
 - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to add, change, or delete a requisition if your user ID does not have 'Full rights to the requisitioner's org ID in the user security group's security profile.
 - On new purchase requisitions, if you enter a requisitioner's org, project (on the Accounting Defaults tab - Project's Owning Org (PROJ. ORG_ID)), and organization (in the Accounting Defaults tab) not authorized for the user ID, Costpoint displays an error message. In addition, if you link a project (on the Accounts subtask - Project's Owning Org (PROJ. ORG_ID)) and an organization (on the Accounts subtask) that are not authorized for the user ID, Costpoint displays an error message.
 - If approval process is required – If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's org ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID and changes will still be saved.
 - Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- **Update**
 - Costpoint now displays an error message if you update one of the following and your logged-in user ID is not authorized to do so:
 - Requisitioner's Org
 - Project (on the Accounting Defaults tab - Project's Owning Org)
 - Organization (on the Accounting Defaults tab)
 - Project (on the Accounts subtask - Project's Owning Org)
 - Organization (on the Accounts subtask)
 - If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's organization ID.
- **Buyer Assignment** – Costpoint requires the buyer to be authorized for the requisitioner's organization ID.
- **Lookup**
 - Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.
 - Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

The following are the changes to this screen:

- **Data Entry**

Costpoint

- If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to add, change, or delete a requisition if your user ID does not have 'Full rights to the requisitioner's org ID in the user security group's security profile.

On new purchase requisitions, if you enter a requisitioner's org, project (on the Accounting Defaults tab - Project's Owning Org (PROJ. ORG_ID)), and organization (in the Accounting Defaults tab) not authorized for the user ID, Costpoint displays an error message. In addition, if you link a project (on the Accounts subtask - Project's Owning Org (PROJ. ORG_ID)) and an organization (on the Accounts subtask) that are not authorized for the user ID, Costpoint displays an error message.
- If approval process is required – If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's org ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID and changes will still be saved.
- Find/Query – Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
 - Costpoint now displays an error message if you update one of the following and your logged-in user ID is not authorized to do so:
 - Requisitioner's Org
 - Project (on the Accounting Defaults tab - Project's Owning Org)
 - Organization (on the Accounting Defaults tab)
 - Project (on the Accounts subtask - Project's Owning Org)
 - Organization (on the Accounts subtask)
 - If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the requisitioner's organization ID.
 - Buyer Assignment – Costpoint requires the buyer to be authorized for the requisitioner's organization ID.
 - Lookup
 - Organization – Costpoint now filters and only displays organizations that are authorized for the logged-in user ID.

Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the logged-in user ID.

Apply PO Info to Purchase Requisitions by Line (PPMRQLN)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the Requisitioner's Org at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Costpoint

- Update
 - Costpoint now displays an error message if you update either the project (on the Accounts subtask - Project's Owning Org) or organization (in the Accounts subtask) where the user ID is not authorized.
 - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.
- Buyer Assignment – Costpoint requires this to be authorized for the requisitioner's organization ID.
- Lookup
 - Organization – Costpoint now filters and only displays organizations that are authorized for the user ID.
 - Project – Costpoint now filters and only displays projects with owning organizations that are authorized for the user ID.

Approve Purchase Requisitions (PPMRQAPX)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the Requisitioner's Org at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
 - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.
 - If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
 - If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
 - If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.

Approve Purchase Requisition Lines (PPMRQAPL)

The following are the changes to this screen:

- Find/Query – Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, regardless of rights to projects and organization rights at the account distribution level. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.
- Update
 - If you add an approval process/approval title, at least one of the approval title users must be authorized for the requisitioner's organization ID.

Costpoint

- If all the users for the approval titles in the approval process are authorized for the requisitioner's org ID, the changes will be saved.
- If none of the users for the approval titles in the approval process are authorized for the requisitioner's org ID, Costpoint will display an error message.
- If at least one of the users for the approval titles in the approval process is authorized for the requisitioner's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the requisitioner's org ID.

Print Purchase Requisitions (PPRPRRQ)

The following are the changes to this screen:

- **Print**
 - Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisitioner's organization linked to it.
 - Costpoint displays an error message if you select a specific requisitioner organization that you do not have full rights to.
- **Report** – Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."
Costpoint will not update the Printed Flag for the requisition that has suppressed data and will consider it as not printed.

View Purchase Requisition Status (PPQRQSTS)

Costpoint now filters records based on your organization rights for the requisitioner's organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning organizations and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Assign Purchase Requisition Lines to Buyers (PPMBUYAL)

Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, whether or not the user logged-in ID has rights to projects' owning orgs and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Costpoint will validate and display an error message if the user ID(s) linked to the Buyer's Employee ID is not authorized for the requisitioner's organization at the header.

Assign Purchase Requisitions to Buyers (PPMBUYAS)

Costpoint now filters records based on your organization rights for the project/organization at the header. However, Costpoint displays all requisition lines, whether or not the logged-in user ID has rights to projects' owning orgs and organizations at the account distribution level linked to the requisition line. You can use Extensibility to suppress the line linked to a project/organization that is not authorized for the user ID, or include the line but hide certain fields within it.

Costpoint will validate and display an error message if the user ID(s) linked to the Buyer's Employee ID is not authorized for the requisitioner's organization at the header.

Print Purchase Requisition Approval Status Report (PPRAPPR)

Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisition organization linked to it.

Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

Print Purchase Requisition Commitment (PPRCOMT)

Costpoint displays an error message if you select and print a specific requisition and you do not have full rights to the requisition organization linked to it.

Costpoint also suppresses all line information for the requisition, and prints the following message on the report: "Requisition not printed. Your user ID is not authorized for the Requisitioner's Org on this requisition."

The report will still include the total amounts for the report, including amounts from those requisitions that were suppressed.

View Help About (SYMABOUT)

The Organization Security feature for the Engineering Change Notices (ECN) module has been registered on the View Help About (SYMABOUT) screen.

Manage Engineering Change Project Approvers (ECMPRAPP)

The following are the changes to this screen:

- Find/Query (Projects) — Costpoint now finds and filters existing records based on projects with owning organizations that are authorized for the logged-in user ID.
- Lookup (EC Project Approvers)
 - Project Abbreviation — Costpoint now narrows the search and displays only project abbreviations with owning organizations that are authorized for the logged-in user ID.
 - Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- Data Entry — If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have "Full" rights to the project's owning organization in the user security group's security profile.

Manage Engineering Change Notices (ECMECN)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your organization rights for the originator's organization ID, and you can only see ECNs where you have rights to the same.
- Lookup
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.
 - Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- Data Entry
 - If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have "Full" rights to the originator's org ID and the project's owning organization in the user security group's security profile.
 - If approval process is required — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the originator's org ID.
 - If all the users for the approval titles in the approval process are authorized for the originator's org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the originator's org ID, Costpoint will display an error message.

- If at least one of the users for the approval titles in the approval process is authorized for the originator's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the originator's org ID and changes will still be saved.

Update Approved Engineering Change Notices (ECMAMAIN)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your organization rights for the originator's organization ID, and you can only see ECNs where you have rights to the same.
- Lookup
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.
 - Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have "Full" rights to the originator's org ID and the project's owning organization in the user security group's security profile.
- If approval process is required — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the originator's org ID.
 - If all the users for the approval titles in the approval process are authorized for the originator's org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the originator's org ID, Costpoint will display an error message.
- If at least one of the users for the approval titles in the approval process is authorized for the originator's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the originator's org ID and changes will still be saved

Approve Engineering Change Notices (ECMAPPR)

The following are the changes to this screen:

- Find/Query — Costpoint now finds and filters existing records based on your organization rights for the originator's organization ID, and you can only see ECNs where you have rights to the same.
- Lookup
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.
 - Project — Costpoint now narrows the search and displays only projects with owning organizations that are authorized for the logged-in user ID.
- Update/Edit
- If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter or select a project if your user ID does not have "Full" rights to the originator's org ID and the project's owning organization in the user security group's security profile.
- If approval process is required — If you add an approval process/approval title, at least one of the users for each approval title(s) must be authorized for the originator's org ID.
 - If all the users for the approval titles in the approval process are authorized for the originator's org ID, the changes will be saved.
 - If none of the users for any of the approval titles in the approval process are authorized for the originator's org ID, Costpoint will display an error message.

- If at least one of the users for the approval titles in the approval process is authorized for the originator's org ID, Costpoint will display a warning message that not all of the approvers are authorized for the originator's org ID and changes will still be saved.

Apply Engineering Change Notices (ECPINECN)

If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter an ECN, and organization with a user ID that is not authorized for the originator's organization ID. In addition, if you do not have full rights to the originator organization for a particular ECN, Costpoint will only process records where your user ID is authorized for the originator's organization ID linked to the ECN. ECNs without the originator's ID will also not be processed, and Costpoint will display a message that says you are not authorized for the originator's organization ID linked to the ECN.

View Engineering Change Notice Status (ECQECNST)

The following are changes to this screen:

- Find/Query — Costpoint now finds, filters, and lets you view existing records based on your organization rights for the originator's organization ID. However, Costpoint displays all ECNs regardless of the impacted projects linked to the ECNs.
- Lookup
 - ECN — Costpoint now narrows the search and displays only ECNs that are linked to the originator's organization that are authorized for the logged-in user ID.
 - Organization — Costpoint now narrows the search and displays only organizations that are authorized for the logged-in user ID.

Print Engineering Change Notice Impact Report (ECRIMPCT)

If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter an ECN where your user ID is not authorized for the originator's organization ID linked to the ECN in the user security group's security profile.

Print Engineering Change Notice Travelers (ECRTRVLR)

If you enabled organization security in the system setting, and the screen is activated for organization security, Costpoint will not allow you to enter an ECN and organization with a user ID that is not authorized for the originator's organization ID linked to the ECN in the user security group's security profile. Costpoint will only display ECNs where you have full rights to the originator's organization ID and will not display records that do not have the originator's organization ID.

On the report, Costpoint will display a message that says you are not authorized for the originator's organization ID linked to the ECN.

Organization Security for Procurement Planning in Help About

The Features subtask now includes the Organization Security for Procurement Planning.

This enhancement requires PATCH5114.

Administration

Select a Preferred Notification Method

With Costpoint configured for Skype for Business, you can choose to receive notifications via email or instant message. The new **Preferred Notification Method** drop-down list on the following screens:

- Configure System Settings (SYMSETNG)
- Manage Users (SYMUSR)

- Configure User Preferences (UPMUSRPR)

This enables you to select whether users should be notified of application updates using email, instant message via Skype for Business, or both.

You must have Skype for Business configured to select IM as the notification method.

This enhancement requires the following for the Configure System Settings (SYMSETNG) application:

An Updated “Company to Copy Settings From” Process to Set the Default Value of Skype Instant Message (IM) Notifications in the Set Up Company (SYPCOMP) Application

In Set Up Company (SYPCOMP), the Company to Copy Settings From process now includes IM and IM and Email as default notification values when copying settings from the selected company. The default notification value for the new company is based on the copied company’s Preferred Notification Method setting.

For example, if the company selected to copy settings from uses IM and Email as the preferred notification method, then the new company’s default notification method will also be IM and Email. If the company selected in the **Company to Copy Settings From** field does not have a preferred notification method, then the default notification method is set to Email.

To support this enhancement, database changes included:

- Adding a new NOTIFICATION_METHOD column to the SYS_SETTINGS table.
- Modifying the length and adding a default value to the NOTIFICATION_METHOD column in the SYS_SETTINGS table.

Improved Multi-Company Visual Identifier

To easily identify the open company in Costpoint, its name now displays on the Global Menu header.

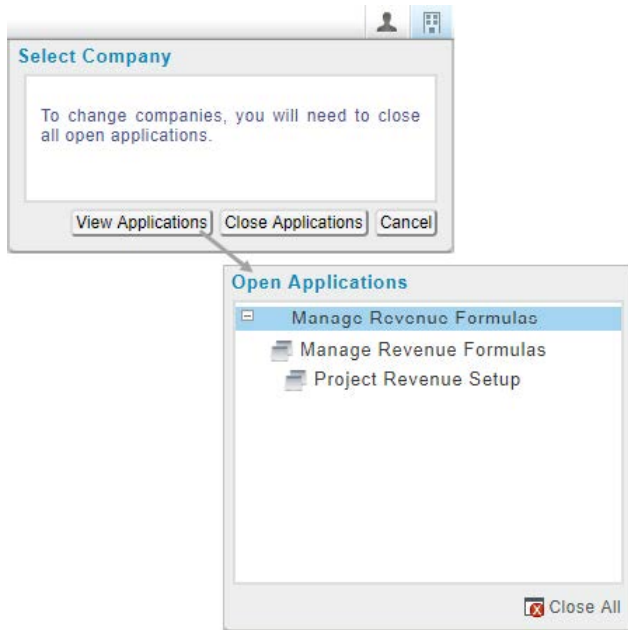
If the UI background color is defined in the Configure System Settings (SYMSETNG) application, then the specified color also displays in the background of the company name on the Global Menu header.

This enhancement requires cp711_sys_039.zip.

Improved Select Company Functionality

The Select Company menu is improved with more efficient functionality. Previously, if an application was open when you tried to select another company, you had to exit the menu to close all open applications before attempting to select a new company again.

Now, you can manage open applications within the Select Company dialog box. If applications are open, you have the option to close the applications or view a list of the open applications and then close them.



Reports & Analytics

T Role-Based Dashboards: Usability Enhancements

Role-based dashboards available in Costpoint are continuously being updated to improve usability and the overall of the dashboards.

In this release, the following changes have been implemented:

- The Projects Approaching Funding dashpart has been renamed to Projects Over x% Funding. On the Reports tab, x% dynamically changes, depending on the **Approaching funding %** value you selected on the Parameters tab (for example, if you selected 50%, the title becomes Projects Over 50% Funding).

On the chart, the % complete labels now display on the chart bars. In addition, the subtitle “for subperiod ending: mm/dd/yy” has been changed to “subperiod end mm/dd/yy.”
- The following Aging dashparts have been renamed on both the Parameters and Reports tab to more accurately indicate that the data presented have been outstanding for more than 30 days:
 - AR Aging is now AR Over 30.
 - AP Aging is now AP Over 30.
 - Aged Open Billing Detail is now Open Billing Over 30.
- The **Current** bucket label has been changed to **0-30** on the following charts:
 - AR Current
 - AP Current
 - Current Open Billing
- The amounts displayed on the following charts are now based on the company’s functional currency, as set up in the Costpoint database being accessed. The functional currency is also displayed on the chart legend.
 - AR Current and AR Over 30
 - AP Current and AP Over 30
 - Current Open Billing and Open Billing Over 30

- Project Over x% Funding



The following dashparts are available on the Project Manager Dashboard, Organization Manager Dashboard, and Finance Manager Dashboard.

- AR Current and AR Over 30
- Current Open Billing and Open Billing Over 30

The Projects Over x% Funding dashpart is available on the Project Manager Dashboard and Organization Manager Dashboard.

The AP Current and AP Over 30 dashparts are available only on the Finance Manager Dashboard.

Usability Enhancements for the Projects Approaching Funding Dashpart

Role-based dashboards available in Costpoint are continuously being updated to improve usability and the overall look of the dashboards.

In this release, the enhancements are for the Projects Approaching Funding dashpart, which is available on the Project Manager Dashboard and Organization Manager Dashboard. The changes include the following:

- The chart type (previously a stacked bar chart) has been changed such that the funding and revenue amounts are represented in separate bars. The chart legend now also displays **Funding** and **Revenue**.
- The chart displays the appropriate subperiod end date for the data being displayed, right-aligned on the top-right corner of the chart.
- The chart displays the X and Y axis titles. Previously, the Y axis displayed just the project name label, while the X axis displayed the amount without the currency. Now, the Y axis displays "Projects" as the axis title, and the X axis displays "US Dollars" along with (000) to reflect that the data is presented in thousands.

There are no changes on the parameters that define the dashpart (that is, the parameter fields on the Parameters tab for Projects Approaching Funding remain the same).

Known Issues

Discount Amount From Voucher Settings Not Factored in Outstanding Amount on AP Charts

The value of the discount amount (S_POST_DISC_GL_CD) from the Voucher Settings (VCHR_SETTINGS) table is currently not included in the calculation of the outstanding amounts displayed on the AP Current and AP Over 30 charts on the Finance Manager Dashboard.

Drill-Through Application Not Automatically Loading the Result Set

On the Labor Utilization dashpart of the Organization Manager Dashboard, clicking an employee ID link brings up the Utilization Analysis (COL1, BOL1, POL1) screen. This screen, however, does not automatically load the result set for the selected employee ID link. To display the utilization analysis information on this screen, you must click the **Execute** icon on the toolbar or press F3.

Duplicate Tooltips

If you use Internet Explorer, duplicate tooltips may display when you hover over a bar or a bar segment on the following charts:

- **AR Current and AR Over 30 charts** — Available on all three dashboards
- **Current Open Billing and Open Billing Over 30 charts** — Available on all three dashboards
- **AP Current and AP Over 30 charts** — Available only on the Finance Manager Dashboard

Costpoint

- **Projects Over x% Funding chart** — Available only on the Project Manager Dashboard and Organization Manager Dashboard
- **Timesheet Status chart** — Available only on the Organization Manager Dashboard

Incorrect Color Palette Used for the Current Charts

The color palette applied to the **0-30** bucket label and bars on the AR Current, AP Current, and Current Open Billing charts is the same as that for the **31-60** day aging bucket on the AR Over 30, AP Over 30, and Open Billing Over 30 charts.

Inconsistent Dashpart Titles

“Projects Over x% Funding” displays on the Parameters tab, while the Reports tab has “Projects Over x% of Funding.” The latter will be modified to agree with the title on the Parameters tab.

“Current Open Billing Detail” displays on the Parameters tab, while the Reports tab has “Current Open Billing.” The one on the Parameters tab will be updated to remove “Detail” from the title.

Viewing the Online Help

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

Configuration Screen for Costpoint Enterprise Reporting

The new Manage Reporting Current Period screen has been added in preparation for an upcoming change to Costpoint Enterprise Reporting (CER). This screen would allow the configuration of the current reporting period for CER. There are two Update Modes when the reporting period is set:

- **Auto** — Select this option to set the current reporting period based on when the system date falls in.
- **Manual** — Select this option to manually set the current reporting period by entering the **End Date**, **Fiscal Year**, **Period**, and **Subperiod** values on screen.



Although this screen is already available in the Reports and Analytics domain, it has no impact on the current functionality of CER yet. A future version of CER will be required for this screen to take effect.

Budgeting and Planning

Organizational Budgeting

There are no changes to Organizational Administration for this release.

Project Budgeting

Resource Planning

Budgeting & Planning includes a new resource planning application (Budget by Resource) that enables you to select a resource, or a team of resources, and then assign the selected resources to multiple budgets at the same time.

Functionality is currently limited to employee resources, but vendor employees will be added in a future release.

You can assemble team resources by name, generic staff, or text entry, or use new Advanced Search functionality to select resources according to skills or credentials, or other criteria, such as supervisor, organization ID, or GLC.

Other key abilities include:

- Save selected teams for future use.
- View assignment utilization and hours.
- View all projects to which a resource is assigned.
- Add, edit, or delete project assignments.
- Update Project Budgets/EACs with budget assignments.
- Commit assigned budgets. (Includes an optional default configuration setting.)

Configuration Settings

See “Budget By Resource Configuration Setting” below for more information.

Other Related Enhancements

The Advanced Search functionality described in these release notes was also added to the Staff Hours subtask of the following applications:

- Project Budgets/EACs
- Project Non-Backlog Budgets (NPI7)
- Project Proposals (NPI4)

In the above applications, the Advanced Search subtask only displays if the budget/EAC has a status of Working. In all other aspects, the feature performs as described in this document.

Budget Resource Planning

To open the application, click **Projects » Project Budgeting » Budget/EAC Processing » Budget By Resource**.

From the Budget By Resource screen, you can select individual resources by type or find resources using search criteria. To get started, you must first select the assignment date range for the budget period you want to plan.

Refer to the screen images below to learn more about using this planning tool.

Select a Resource by Type

Select the date range you want to use when entering resource hours, provided the budget performance period falls within this range.

Search for and select a previously saved team.

Search for a resource by type (Employee, Generic Staff, or Keyboard Entry).

Enter or Lookup the Resource ID.

Click **Select Resource** to add the resource. (Shown in table below.)

Search for resources using other criteria, such as skills or credentials. (See next page.)

Budget Resource Planning

Assignment Range From 01/01/2014 To 01/01/2018

Teams [] [Select Team] [Save Team] [Delete Team]

Resource Type: -None- Resource ID: [] Name: [] [Select Resource]

Selected Resources

ID Type	ID	Name	Assignment Utilization %	Assignment Hours	Status
Generic Staff	12	12	0.00%	0.0000	
Employee	10050	Zachaeus, Steven	0.02%	40.0000	

These resources were selected from Resource Type and Resource ID.

Budget Resource Planning

Assignment Range From 01/01/2014 To 01/01/2018

Teams [] [Select Team] [Save Team] [Delete Team]

Resource Type: Employee Resource ID: [] Name: [] [Select Resource]

Selected Resources

ID Type	ID	Name	Assignment Utilization %	Assignment Hours	Status
Generic Staff	12	12	0.00%	0.0000	
Employee	10050	Zachaeus, Steven	0.02%	40.0000	

Select Resources Using Advanced Criteria, Modify Resource Hours, and Update Project Budgets/EACs

Click the **Advanced Search** subtask link to search for multiple employee resources using other criteria.

For any search category, enter the search criteria or use Lookup to select it.

Click the Add button for that category.

Added search criteria display. See below for additional details.

Advanced Search

Resource Type: Employee

Resource Search Criteria

Supervisor	Home Organization	General Labor Category	Skill	Credential
ALEXANDER	2.01.4120	ANAL	BENE ACCTNG/FIN	

Reset Find Resources

Click here to execute the search.

After you click **Find Resources**, the results display in the Resources table.

Budgeting and Planning

Select the resources that meet your team requirements, or leave the top check box selected to add them all.

Resources						
<input checked="" type="checkbox"/>	ID Type	ID	Name	Home Org ID	Default Acct ID	Default PLC
<input checked="" type="checkbox"/>	Employee	10032	Zephyr, Kim	2.01.4120		None
<input checked="" type="checkbox"/>	Employee	10033	Zephyr, Wayne	2.01.4120		None

Click here to add selected resources.

After you click **Add Resources**, selections are added to the Selected Resources table.

In this example, the table displays two resources selected using Resource Type and two selected using Advanced Search.

Selected Resources						
<input checked="" type="checkbox"/>	ID Type	ID	Name	Assignment Utilization %	Assignment Hours	Status
<input checked="" type="checkbox"/>	Generic Staff	12	12	0.00%	0.0000	
<input checked="" type="checkbox"/>	Employee	10050	Zacchaeus, Steven	0.02%	40.0000	
<input checked="" type="checkbox"/>	Employee	10032	Zephyr, Kim	0.00%	0.0000	
<input checked="" type="checkbox"/>	Employee	10033	Zephyr, Wayne	0.00%	0.0000	

Click this button to update Project Budgets/EACs for all selected resources. See "Budget/EAC Processing Rules" below.

Click here to plan hours for a selected resource.

After you click **Add/Edit/Delete Assignments**, you can update hours on existing budgets assignments, add new budgets, or delete budgets.

See the "Row Headings" section in the table below for more information.

Add/Edit/Delete Assignments									
<input checked="" type="checkbox"/>	Project ID *	Project Name	Saved Status	Source	10/28-11/24*00 (160/160)	11/25-12/29*00 (200/200)	12/30-01/26*01 (160/160)	01/27-02/23*01 (160/160)	02/24-03/23*01 (160/160)
	10100	E-Commerce Application af		BUD	10.00	10.00	10.00	10.00	0.00
	Assignment Total				10.00	10.00	10.00	10.00	0.00
	Available Hours				160.00	200.00	160.00	160.00	160.00
	Remaining Hours				150.00	190.00	150.00	150.00	160.00

Click **Assign** to update Project Budgets/EACs for this individual resource. See "Budget/EAC Processing Rules" below.


For a complete listing and description of all the fields that display in the Add/Edit/Delete Assignments subtask, see the online help. The following is a partial list only.

Column/Row Heading	Description
Project ID	This non-editable field displays the Project ID number. The same Project ID may display multiple times if the resource is used under different account IDs, Org IDs, or PLCs.
Row Headings	
The last three rows of the first column, which are colored yellow, display totals. The totals, which vary by column, always reflect the From/To period you selected in Assignment Range at the top of the screen.	
Assignment Total	Assignment hours are the hours assigned to the resource within the selected assignment range. Assignment totals display in the following columns:

Column/Row Heading	Description
	<ul style="list-style-type: none"> ▪ Assignment Hours – Displays the total number of hours the resource has been assigned. ▪ Assignment Utilization % – Displays the total utilization % the resource has been assigned. ▪ Period (dated column) – Displays the total hours assigned to the resource for a specific period within the selected date range
Available Hours	<p>Available hours are the hours available to for resource within the selected assignment range.</p> <p>Available hour totals display in the following columns.</p> <ul style="list-style-type: none"> ▪ Assignment Hours – Displays the total number of hours the resource has available. ▪ Assignment Utilization % – Displays the % the assignment hours represent. ▪ Period (dated column) – Displays total hours the resource has available for a specific period within the selected date range.
Remaining Hours	This row represents the difference between the Available Hours and the Assigned Hours, which is same calculation that is used to arrive at the Utilization %.
Commit	<p>Select the check box to commit the budget when you click Assign or Assign All Resources.</p> <p>If the Resource Budget Commit Flag Default setting in Configuration Settings (MAM10) is selected, this check box is selected by default, and budgets with a Status of Working are automatically committed when you click Assign, but the check box can be edited in this screen.</p> <p>That version of the budget will not be set to Approved, and you must approve it from the Project Budgeting/EACs application.</p>
Assignment Start Date	This column displays the assignment start date as entered in the Assignment Range date fields.
Assignment End Date	This column displays the assignment end date as entered in the Assignment Range date fields.

Assign Resource Hours to Project Budgets/EACs

After you finish planning hours for the selected resource, you can save your changes and continue planning hours for other resources, or before proceeding, you can update staff hours in the Project Budgets/EACs application with the current resource assignments by clicking **Assign** on the Add/Edit/Delete Assignments subtask.

To save changes without assigning them, click  on the global menu and then click **Close** on the Add/Edit/Delete Assignments subtask.

The Add/Edit/Delete Assignments table and the Selected Resources table both include a status column that indicates whether or not a resource record has been saved.

Budgeting and Planning

After you finish planning hours for all resources, click Assign All Resources on the Selected Resources table to update process your changes and update staff hours in the Project Budgets/EACs application.

Budget/EAC Processing Rules

When the Project Budgets/EACs application is updated, the status of an existing budget changes, and if no budget already exists, one is created. Committing the budget also affects the status.

Depending on configuration, the **Commit** check box in the Add/Edit/Delete Assignment subtask will be either selected or clear by default. If it is not selected, the budget must be committed from the individual project budgets.

During processing, budgets are updated according to the following rules:


- If no budget exists, a new Working Budget is created. If the Commit check box was selected, an Incomplete Budget is created.
- If a Working Budget/EAC exists, it is updated. If the Commit check box was selected, an Incomplete Budget with same version number is created.
- If an Incomplete Budget/EAC exists, it is updated. If the Commit check box was selected, an Incomplete Budget with same version number is created. Budget & Planning first creates a Working Budget to add the entry, and if Commit is selected, it then creates a budget with a status of Incomplete with the same version number.
- If a Complete Budget/EAC exists and the Commit check box was selected, an Incomplete Budget/EAC is created. If the Commit check box was clear, a new Working budget/EAC is created with the same version number.
- If an Approved Budget/EAC exists and the Commit check box was selected, a new Working Budget/EAC is created. If the Commit check box was clear, a new Working budget/EAC is created with the same version number.

Save Teams

Prior to closing the application, you can use the Save Team functionality to save the selected group of resources as team, which you can select in future planning sessions.

To save a team, complete the following steps:

1. In the **Teams** field, enter a name for the team.
2. Click **Save Team**.

To search for a previously saved team, in the Teams field, click  to select the team using Lookup or enter the team name.

Advanced Search

The Advanced Search functionality which was developed for the Budget by Resource application was also added to the Staff Hours subtask of the following applications:

- Project Budgets/EACs
- Project Non-Backlog Budgets (NPI7)
- Project Proposals (NPI4)

In the above applications, the Advanced Search subtask only displays if the budget/EAC has a status of Working. In all other aspects, the feature performs as described in this document. See “Select Resources Using Advanced Criteria...” in the Resource Planning feature description to learn more about using this feature.

Budget By Resource Configuration Setting

A **Resource Budget Commit Flag** check box was added to the Projects tab of **Admin » Budget Administration » Administration Controls » Configuration Settings (MAM10)**. When this option is selected, the **Commit** check box in the Add/Edit/Delete Assignments subtask will be selected by default, but the user can change the status.

When this check box is selected, the budget is committed when the user clicks **Assign**, or clicks **Assign All Resources**. If it is not selected, the user must instead commit the budget from the individual project budgets.

Budgeting Administration

EREPORT_PROJ_TREND Updated with Budget Details During Refresh

During the refresh process, the EREPORT_PROJ_TREND table is now updated with ITD and YTD budget details, enabling use of this information in Costpoint Enterprise Reporting.

Time and Expense

Time

Printing Leave Reports Enabled for Managers

Managers and Supervisors can now print leave reports from the Manage Approve Timesheets application.

Active Field Default Setting Updated

The **Active** field in **Time >> Timesheet >> Manage Resource Work Schedules** was updated so the default setting is 'Yes.'

UDT Field Relocated on Manage Timesheet Header

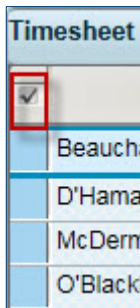
When enabled, the UDT 09 (Org) field now displays below the **Signature** field on the **Time » Timesheets » Manage Timesheets** screen.

New Timesheet Mass Approval Capability

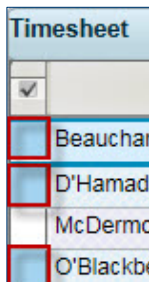
Users of the **Time » Timesheets » Manage/Approve Timesheets** screen now have the ability to approve multiple timesheets in a single step. To enable this enhancement, system administrators should select the new **Allow Mass Approval of Timesheets** check box on the Miscellaneous tab of the **Time » Time Controls » Configure Time Settings** screen.

To approve multiple timesheets from the **Time » Timesheets » Manage/Approve Timesheets** screen, do one of the following:

- Approve all timesheets by selecting the check box at the top of the check box column, as in the following figure:



- Approve selected timesheets by clicking [**CTRL+Click**] each individual check box:



Click **Approve** to approve all selected timesheets.

Time and Expense

Although multiple timesheets are selected for approval, timesheets are individually validated. If error or warning messages display for individual selected timesheets, click OK to dismiss the messages. You can then click Approve again to approve the remainder of the selected timesheets.

Expense

Default Attachment Type Added

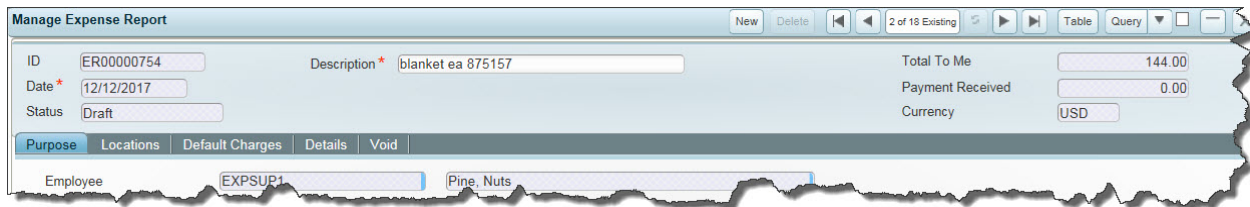
The attachment type now displays by default in the **Attachment Type** field if only one type is available.

Required Fields Signified by Red Asterisk

Required fields in the Manage Expense Report and Manage Expense Authorization screens are denoted with a red asterisk [*]. Failure to complete these fields results in an error message.

Expense Report Header Modifications

The **Expense » Expense Reports » Manage Expense Report** screen was modified so that basic information about the expense report now displays above the Purpose, Locations, Default Charges, Details, and Void tabs.



The screenshot shows the 'Manage Expense Report' window. At the top, there are buttons for 'New', 'Delete', and navigation controls. Below these, the header fields are displayed in a constant view. The fields include: ID (ER00000754), Description* (blanket ea 875157), Total To Me (144.00), Date* (12/12/2017), Payment Received (0.00), Status (Draft), and Currency (USD). Below the header fields, there are tabs for 'Purpose', 'Locations', 'Default Charges', 'Details', and 'Void'. The 'Purpose' tab is currently selected, showing 'Employee' (EXPSUR1) and 'Pine, Nuts'.

The header fields are now in constant view and include the following:

- **ID** – This field was on the Purpose tab.
- **Description** – This field was on the Purpose tab.
- **Date** – This field was on the Purpose tab.
- **Status** – This field was on the Purpose tab.
- **Total To Me** – This field was labeled **Total Amount Due To Employee**. That label is still used in the printed expense report. The new label, **Total To Me**, displays only on the screen. It displays on both the header and the Details tab.
- **Payment Received** – This field displays on both the header and the Details tab.
- **Currency** – This field displays on both the header and the Details tab.

Approval Tasks Enhancement

In Manage/Approve Expense Reports and Manage/Approve Expense Authorizations, you will be able to filter according to approval task, including the following:

- Approve ER tasks
- Approve charge Tasks
- Approve attachment tasks

When launched from the Desktop, the task type will default.

Expense Authorization Header Modifications

The **Expense » Expense Authorizations » Manage Expense Authorization** screen was modified so that basic information about the expense authorization now displays above the Purpose, Locations, Default Charges, Details, and Void tabs.

The screenshot shows the 'Manage Expense Authorization' window. At the top, there are fields for ID (EA00000109), Description (test), Date (01/03/2018), Status (Draft), and Estimated Costs (0.00). Below these fields are tabs for Purpose, Locations, Default Charges, Details, and Void. The 'Purpose' tab is currently selected, showing fields for Employee (EXPSUP1), Type (CJCOMINTER), and a location description (Sourcream, Milk).

The header fields are now in constant view and include the following:

- **ID** – This field was on the Purpose tab.
- **Description** – This field was on the Purpose tab.
- **Date** – This field was on the Purpose tab.
- **Status** – This field was on the Purpose tab.
- **Estimated Costs** – This field displays in the header and continues to display in the Details section.

Manage/Approve Expense Authorizations: Include Optional Tasks Setting

An **Include Optional Tasks** check box was added to the Task Type section of **Expense » Expense Authorization » Manage/Approve Expense Authorization**.

When you filter by Outstanding Tasks and **Include Optional Tasks** is selected, the results include expense authorizations that have both required and optional tasks outstanding.

When **Include Optional Tasks** is *not* selected, the results include only expense authorizations with required tasks outstanding, and optional tasks are excluded.

Excluding optional tasks can reduce the number of results returned and thus improve system performance.

Manage/Approve Expense Reports: Include Optional Tasks Setting

An **Include Optional Tasks** check box was added to the Task Type section of **Expense » Expense Report » Manage/Approve Expense Reports**.

When you filter by Outstanding Tasks and **Include Optional Tasks** is selected, the results include expense reports that have both required and optional tasks outstanding.

When **Include Optional Tasks** is *not* selected, the results include only expense reports with required tasks outstanding, and optional tasks are excluded.

Excluding optional tasks can reduce the number of results returned and thus improve system performance.

Configuration

A **Default Application ID** field was added to **Configuration » Resources » Manage Preferences** that enables users to select a default application that will display when they log onto Time and Expense.

Additionally, an **Application Name** field was added that displays the name of the default application you select.



The **Default Application ID** and **Application Name** fields were also added to **Admin » Security » System Security » Manage Users**. Time and Expense administrators can use these fields to select the application that will automatically display when users log onto Time and Expense.

PLC Default Update

You can now configure the PLC as not required if a project does not contain any linked PLCs. Previously, the PLC defaulted on the timesheet, even when it was not configured as required in **Configuration » Master Data » Manage Project**.

When General Configuration is set to use Link27:

- When the **UDT07 Required** checkbox in Manage Project is not selected, and no Direct or Wildcard links exist, the charge on the TS line will be validated for the presence of the UDT07 and return an error if one exists.

Exceptions that can occur in Manage Timesheets and Approve Timesheet applications:

- If the PLC is present in the charge from charge tree or favorites, it will default but not be validated.
- If the PLC defaults from Employee history, it will not be validated.
- If Link17 is enabled in enabled General configuration, the validation will be enabled on the link17, and it will be required even if the Link27 is not used, which is uncommon.

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