Deltek

Deltek Costpoint® Enterprise

Production Release Notes

August 21, 2019

Contents

Overview

This document is a compilation of enhancements made in Costpoint, Budgeting and Planning, and Time & Expense from March 9 – June 10, 2019.

These enhancements were available in the Preview (non-production) environment as of July 17, 2019. Final versions of the enhancements were applied to the Production environment on August 21, 2019.

Note that this document does not include the calendar year-end or regulatory information. Those documents are available from the Release Notes page of the Costpoint Cloud Information Center.

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

　　　　Costpoint 7.1.1 Online Help

Deltek

Costpoint

Accounting

Print Voucher Edit Report for Posted Vouchers

Prior to this release, the Print Voucher Edit Report application can only print voucher edit reports for unposted vouchers. This enhancement provides the ability to print voucher edit reports for either posted or unposted vouchers. This enables you to recreate a copy of a report for posted vouchers without having to create a CER report to get the necessary information.

The Print Voucher Edit Report screen provides the **Posting Status** group box which contains the **Unposted Only** and **Posted Only** options. You can use these options to specify if the report is for unposted or posted vouchers.

Posting Sequence is now an available option in the **Selection Ranges** group box.

If the report is for posted vouchers, the Post Sequence Number is included on the printed report.

AP EFT Payment Notifications

The Costpoint Accounts Payable Electronic Fund Transfer Payment Notification enhancement allows you to automatically notify vendors when payment for their invoices has been sent to the bank or has been sent directly to the vendor. This feature enables real-time reflection of payment activity within Accounts Payable in Costpoint.

This enhancement impacts the following screens:

- Print/Void Checks (APRCK): The **Print EFT Advices** option on the Print/Void drop-down list has been updated to **Print/Email EFT Advices**. If you selected this option and you enabled **Email EFT Advice** or **Print EFT Advice** on the Manage Vendors screen, then an email is generated to the email address saved under the vendor record, or an EFT advice is printed, as applicable. If you enabled both the **Email EFT Advice** and **Print EFT Advice** options, then the EFT advice will be sent through email and printed simultaneously.

- Manage Vendors (APMVEND): An **Email EFT Advice** check box has been added to both US and Non-US EFT Info under the Addresses subtask.

- Configure Check/EFT Email Settings (APMCKSET): An EFT Email Settings group box has been added to include the EFT email details, including the recipient's email address, subject of the email, and header and footer texts. A default Email application provides a format for sending EFT emails.

- Import Vendors (AOPUTLVU): An **Email EFT** flag, with **Y** or **N** validation, has been added to the AOPUTLVU_INP_VENDA table.

- Set Up Company (SYPCOMP): If the parent company has the EFT Email Settings enabled, then the newly created company will inherit the setup.

New Vendor Classifications

The New Vendor Classifications is a new feature within Costpoint that includes 8(a) and AbilityOne to the list of vendor classifications on several Costpoint applications.

The 8(a) vendor classification includes vendors under the 8(a) Business Development Program business assistance for small businesses that are owned and controlled by socially and economically disadvantaged individuals (usually at least 51% ownership).

The AbilityOne vendor classification includes vendors under the AbilityOne Program. The program uses the purchasing power of the federal government to buy products and services from participating nonprofit agencies that train and employ workers with disabilities.

This feature gives you the ability to track and report on the various business classifications and manage exclusion data that may impact business.

Contracts

Increase the Length of Skills Description Field

This Costpoint release increases the length of the **Skill Description** (SKILL_DESC) field in the Costpoint Skill (SKILL) table from 30 to **255** to match the size of corresponding field in Deltek Talent Management. This change is in preparation for a future enhancement that will allow you to transfer employee skills information from Costpoint to Deltek Talent Management.

To see the details of the affected screens, please see the People section.

New Vendor Classifications

See details in the Accounting section for the new vendor classification fields.

Projects

FAR and Supplemental Regulation Library Enhancements

Costpoint now provides you the ability to import Federal Acquisition Regulation (FAR) and supplemental regulation library information into the Manage FAR Library and Manage Supplemental Regulations Library screens and tables. When you win work with new customers and need to upload large amount of data into these screens, this feature will facilitate the import process of data from an input file into Costpoint.

Also part of this feature is the addition of new fields to several screens in the Contracts domain so you can track additional information for FAR and supplemental regulation clauses/provisions linked to your contracts and/or subcontracts. This includes the option to automatically flow down FAR and supplemental regulation clauses from a contract to a subcontract record.

Screen Updates

Manage FAR Library (CTMFAR)

The following new fields have been added to this screen to include more details about the FAR clauses/provisions that you maintain within Costpoint:

- **Required** — Select this check box if the FAR clause/provision number should be included when loading required rows only on the Manage Contracts and Manage Subcontracts screens.

- **Included** — Use this drop-down list to indicate whether the FAR clause/provision number and/or description should be printed on a purchase order or on a Costpoint Enterprise Reporting (CER) report. Valid options are None, IBR (Included by Reference), and Full Text.

- **Risk Level** — Select the level of risk associated with the FAR clause/provision number. Valid options are None, High, Medium, and Low.

- **Description** — Enter the full description of the FAR clause/provision number.

- **Editable** — Select this check box to allow editing of the title and description of the FAR clause/provision number on the FAR Clauses/Provisions subtask of the Manage Contracts and Manage Subcontracts screens.

- **Effective Date** — Enter or select the effective date of the FAR clause/provision number.

- **Show in Lookup** — Keep this check box selected to display the FAR clause/provision number in the lookup of the **FAR Number** field on the FAR Clauses/Provisions subtask of the Manage Contracts and Manage Subcontracts screens. Only those numbers that are available in the lookup can be used for new records in Manage Contracts and Manage Subcontracts.

- **Notes** — Enter additional notes associated with the FAR clause/provision number.

- **Subcontract Flow-down** — Select the subcontract flow-down method for the FAR clause/provision number. Your selection determines whether the FAR clause/provision number from the contract (specified in the **Load Options** group box of the FAR Clauses/Provisions subtask of the Manage Subcontracts screen) will flow down to the subcontract record.

- **Subcontract Notes** — Enter notes about the subcontract that is already or will be associated with the FAR clause/provision. You can also add general subcontract notes for the clause.

- **Mitigation Type** — Select the mitigation type that applies to the FAR clause/provision number, which will be used for reporting purposes. Valid options are **None**, **Price**, and **Cost Impact**.

- **Mitigation Notes** — Enter notes associated with the mitigation for the FAR clause/provision number.

A new subtask, Import FAR/Supplemental Regulation Files, has also been added to this screen. Use this subtask to import FAR clauses/provisions from comma-separated files into the Manage FAR Library screen.

You must create an input file before using this subtask.

There are two ways you can upload the input file:

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

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

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

When you import files and errors are found, Costpoint displays the Import FAR Library Error Report. Review the error report and fix the errors before re-uploading the input files. When you have successfully imported the input files, Costpoint updates the Manage FAR Library screen. You must save the record before the updates can be reflected in the respective database table.

> **Attention:** See the online help for more information on using the Import FAR/Supplemental Regulation Files subtask of Manage FAR Library. The following topics are included in the online help of the screen:
>
> - Import FAR/Supplemental Regulation Files Subtask
> - Step-by-Step Procedures on Importing Files
> - Input File Information
> - Error Messages

Manage Supplemental Regulations Library (CTMDFAR)

The following new fields have been added to this screen to include more details about the Defense Federal Acquisition Regulation Supplement (DFARS) and other supplemental regulation clauses that you maintain within Costpoint:

- **Required** — Select this check box if the clause number should be included when loading required rows only on the Manage Contracts and Manage Subcontracts screens.

- **Included** — Use this drop-down list to indicate whether the clause number and/or description should be printed on a purchase order or on a CER report. Valid options are **None**, **IBR** (Included by Reference), and **Full Text**.

> **Note:** Printing of supplemental regulation clause details on purchase orders will be included in a future enhancement in the Materials domain.

- **Risk Level** — Select the level of risk associated with the clause number. Valid options are **None**, **High**, **Medium**, and **Low**.

- **Description** — Enter the full description of the clause number.

- **Editable** — Select this check box to allow editing of the title and description of the clause number on the Supplemental Regulations subtask of the Manage Contracts and Manage Subcontracts screens.

- **Effective Date** — Enter or select the effective date of the clause number.

- **Show in Lookup** — Keep this check box selected to display the clause number in the lookup of the **Clause Number** field on the Supplemental Regulations subtask of the Manage Contracts and Manage Subcontracts screens. Only those numbers that are available in the lookup can be used for new records in Manage Contracts and Manage Subcontracts.

- **Notes** — Enter additional notes associated with the clause number.

- **Subcontract Flow-down** — Select the subcontract flow-down method for the clause number. Your selection determines whether the clause number from the contract (specified in the **Load Options** group box of the Supplemental Regulations subtask of the Manage Subcontracts screen) will flow down to the subcontract record.

> **Attention:** See the online help for more information about this field.

- **Subcontract Notes** — Enter notes about the subcontract that is already or will be associated with the supplemental regulation clause. You can also add general subcontract notes for the clause.
- **Mitigation Type** — Select the mitigation type that applies to the clause number, which will be used for reporting purposes. Valid options are **None**, **Price**, and **Cost Impact**.
- **Mitigation Notes** — Enter notes associated with the mitigation for the clause number.

A new subtask, Import FAR/Supplemental Regulation Files, has also been added to this screen. Use this subtask to import supplemental regulation clauses from comma-separated files into the Manage Supplemental Regulations Library screen.

You must create an input file before using this subtask.

> **Attention:** You can download the template CSV file (CTMDFAR.CSV) from the Deltek Support Center site at https://deltek.custhelp.com.

There are two ways you can upload the input file:
- You can access the input file from the network by using alternate file locations.
- You can upload the input file to the Costpoint database.

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

When you import files and errors are found, Costpoint displays the Import Supplemental Regulations Library Error Report. Review the error report and fix the errors before re-uploading the input files. When you have successfully imported the input files, Costpoint updates the Manage Supplemental Regulations Library screen. You must save the record before the updates can be reflected in the respective database table.

> **Attention:** See the online help for more information on using the Import FAR/Supplemental Regulation Files subtask of Manage Supplemental Regulations Library. The following topics are included in the online help of the screen:
> - Import FAR/Supplemental Regulation Files Subtask
> - Step-by-Step Procedures on Importing Files
> - Input File Information
> - Error Messages

Manage Contracts (CTMCNTR)

The FAR Clauses/Provisions and Supplemental Regulations subtasks of this screen have been revised to display more details about FAR and supplemental regulation clauses associated with the contract, and also to accommodate several other changes brought about by updates to the Manage FAR Library and Manage Supplemental Regulations Library screens.

FAR Clauses/Provisions Subtask

These are the changes to this subtask:

- **Load Required Rows Only** — Previously labeled as **Load Predefined Rows**, this check box now allows you to load only FAR clauses/provisions that have the **Required** check box selected on the Manage FAR Library screen.

- **FAR Number** — This field's lookup now includes only FAR numbers that have the **Show in Lookup** check box selected on the Manage FAR Library screen.

- **Title** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.

- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.

New fields added to the subtask include the following:

- **Risk Level** — This field defaults to the **Risk Level** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.

- **Subcontract Flow Down** — This field defaults to the **Subcontract Flow-down** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid values are **None**, **Optional**, **Required**, and **Not Required**.

- **Notes** — This field defaults to the Notes entered for the FAR clause/provision number on the Manage FAR Library screen, but can be edited.

Supplemental Regulations Subtask

These are the changes to this subtask:

- **Clause Number** — This field's lookup now includes only clause numbers that have the **Show in Lookup** check box selected on the Manage Supplemental Regulations Library screen.

- **Title** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause on the Manage Supplemental Regulations Library screen.

- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause number on the Manage Supplemental Regulations Library screen.

New fields added to the subtask include the following:

- **Load Required Rows Only** — This check box allows you to load only supplemental regulation clauses that have the **Required** check box selected on the Manage Supplemental Regulations Library screen.

- **Risk Level** — This field defaults to the **Risk Level** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.

- **Subcontract Flow Down** — This field defaults to the **Subcontract Flow-down** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid values are **None**, **Optional**, **Required**, and **Not Required**.

- **Notes** — This field defaults to the **Notes** entered for the clause number on the Manage Supplemental Regulations Library screen, but can be edited.

Manage Subcontracts (CTMSBCNTR)

The FAR Clauses/Provisions and Supplemental Regulations subtasks of this screen have been revised to display more details about FAR and supplemental regulation clauses associated with the subcontract, and also to accommodate several other changes brought about by updates to the Manage FAR Library and Manage Supplemental Regulations Library screens.

FAR Clauses/Provisions Subtask

These are the changes to this subtask:

- **Autoload** — When you use the autoload function, the FAR clause/provision will automatically flow down from the selected contract ID to the subcontract record only if the FAR clause/provision's Subcontract Flow-down option is set to Optional, Required, or Not Required on the Manage FAR Library screen or on the FAR Clauses/Provisions subtask of the Manage Contracts screen. If this option is set to **None**, the FAR clause/provision will not flow down to the subcontract record even if it is associated with the selected contract record.

- **Load Required Rows Only** — Previously labeled as **Load Predefined Rows**, this check box now allows you to load only FAR clauses/provisions that have the Required check box selected on the Manage FAR Library screen.

- **Applicable to Subcontract** — If you use the autoload function, this check box's default now depends on the **Subcontract Flow-down** option selected on the Manage FAR Library screen or on the FAR Clauses/Provisions subtask of the Manage Contracts screen:

Subcontract Flow-down option	Applicable to Subcontract check box default	Can Applicable to Subcontract check box be edited?
Optional	Selected	Yes
Required	Selected	No
Not Required	Clear	Yes

> **Note:** If Subcontract Flow-down is set to None, the FAR clause/provision does not flow down from the contract to the subcontract record.

- **FAR Number** — This field's lookup now includes only FAR numbers that have the **Show in Lookup** check box selected on the Manage FAR Library screen.

- **Title** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.

- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.

New fields added to the subtask include the following:

- **Included** — This field defaults to the **Included** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid options are **None**, **IBR** (Included by Reference), and **Full Text**.

- **Risk Level** — This field defaults to the **Risk Level** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.

- **Notes** — This field defaults to the **Notes** entered for the FAR clause/provision number on the Manage FAR Library screen, but can be edited.

- **Subcontract Notes** — Enter additional notes associated with the subcontract.

Supplemental Regulations Subtask

These are the changes to this subtask:

- Autoload — When you use the autoload function, the supplemental regulation clause will automatically flow down from the selected contract ID to the subcontract record only if the supplemental regulation clause's **Subcontract Flow-down** option is set to **Optional**, **Required**, or **Not Required** on the Manage Supplemental Regulations Library screen or on the Supplemental Regulations subtask of the Manage Contracts screen. If this option is set to **None**, the supplemental regulation clause will not flow down to the subcontract record even if it is associated with the selected contract record.

- **Applicable to Subcontract** — If you use the autoload function, this check box's default now depends on the **Subcontract Flow-down** option selected on the Manage Supplemental Regulations Library screen or on the Supplemental Regulations subtask of the Manage Contracts screen:

Subcontract Flow-down option	Applicable to Subcontract check box default	Can Applicable to Subcontract check box be edited?
Optional	Selected	Yes
Required	Selected	No
Not Required	Clear	Yes

> **Note:** If Subcontract Flow-down is set to None, the supplemental regulation clause does not flow down from the contract to the subcontract record.

- **Clause Number** — This field's lookup now includes only clause numbers that have the **Show in Lookup** check box selected on the Manage Supplemental Regulations Library screen.

- **Title** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause on the Manage Supplemental Regulations Library screen.

- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause number on the Manage Supplemental Regulations Library screen.

New fields added to the subtask include the following:

- **Load Required Rows Only** — This check box allows you to load only supplemental regulation clauses that have the **Required** check box selected on the Manage Supplemental Regulations Library screen.

- **Included** — This field defaults to the **Included** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid options are **None**, **IBR** (Included by Reference), and **Full Text**.

- **Risk Level** — This field defaults to the **Risk Level** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.

- **Notes** — This field defaults to the **Notes** entered for the clause number on the Manage Supplemental Regulations Library screen, but can be edited.

- **Subcontract Notes** — Enter additional notes associated with the subcontract.

Update in Post IWO Journal to Assign Correct PLC Description in the Receiving Company

The Post IWO Journal application has been updated to assign the correct project labor category (PLC) description to the transaction in the receiving company so that the documentation on the bill is correct. This application now populates the Open Billing Detail table in the receiving company with the receiving company's description for the PLC included in the transaction.

New Application Menu Items for Automating Multiple Processes

The Costpoint menu has been updated with new applications for an upcoming feature that will automate multiple processes. The design is meant for companies that run the processes for small amounts of data. If you have questions on whether you should use this function, contact Deltek Support Center. The new applications include:

- Compute Revenue Processes (PJPREVP)
- Cost Pool Processes (PJPPOOLP)
- Month End Processes (PJPMENDP)
- Reporting Processes (PJPREPTP)

People

Accrue Paid Leave During Employee's Family Medical Leave

In accordance with Family Medical Leave Act (FMLA) regulations, Costpoint now provides employers with the ability to enable the accrual of paid leave for employees with a **Family Medical Leave** status.

This enhancement allows employers to comply with section 825.209(h) of the FMLA, which states that "An employee's entitlement to benefits other than group health benefits during a period of FMLA leave (e.g., holiday pay) is to be determined by the employer's established policy for providing such benefits when the employee is on other forms of leave (paid or unpaid, as appropriate)."

Application Updates

To support this feature, this release includes the following updates to corresponding applications:

Leave Types (LDMLVTP)

The screen now provides an **Accrue during Family Medical Leave** check box. When leave is computed, employees with a status of **Family Medical Leave** in the Manage Employee Information screen are automatically excluded from processing. If your company policy specifies that employees must continue to accrue this particular type of leave while an employee is on Family Medical Leave Act (FMLA) leave, select this check box to include the leave type in the Compute Leave process.

If you leave the check box unchecked and the employee has a status of **Family Medical Leave** in the Manage Employee Information screen, then the leave type will not be included in the Compute Leave processing.

> **Note:** If the leave accrual is based on the number of hours worked by the employee and the employee does not work any eligible hours in the leave period, then the employee would not receive an accrual.
>
> If your leave type is set up to apply a ceiling on the employee's anniversary date, that ceiling will be applied for an employee on FMLA leave whether or not this check box is selected. If the check box is selected, the employee's accrual will be processed and the ceiling will be applied. If this check box is not selected, the employee will not receive an accrual, but the ceiling will still be applied.

This check box is not available if the Use to track Family Medical Leave check box is selected.

Compute Leave Accruals (LDPCLHF)

The application will now process the leave types that are set to **Accrue during Family Medical Leave** for employees with a status of **Family Medical Leave**.

Print Data Dictionary Report (SYRDD)

The application now provides information for the new Accrue during Paid Family Leave Flag (Y/N) (ACCRUE_DURING_FML_FL) column on the Leave Type (LV_TYPE) table.

Employee Status Field in the Knowledge Screen of Team Management

A new Status field on the Knowledge (HTMKNOWLEDGE) screen of the Team Management module displays the employee's status code (S_EMPL_STATUS_CD) from the Employee (EMPL) table record. You will also be able to use the new Status field when searching records using the Query and Lookup functionalities of the Knowledge screen.

This update is part of an upcoming feature for Costpoint Team Management.

Increase the Length of Skills Description Field

This Costpoint release increases the length of the **Skill Description** (SKILL_DESC) field in the Costpoint Skill (SKILL) table from 30 to **255** to match the size of corresponding field in Deltek Talent Management. This change is in preparation for a future enhancement that will allow you to transfer employee skills information from Costpoint to Deltek Talent Management.

You will now be able to enter a skills description of up to 255 characters in the Manage Skills Codes screen which is accessible in both **People » Employee » Employee Controls** and **Accounting » Accounts Payable » Vendor and Subcontractor Controls** menus. This update affects Costpoint People, Contract Management, Accounting, and Materials Management applications that reference the Costpoint Skills table.

Application Changes

To support the enhancement, this release applies the corresponding updates in the following screens:

Contract Management Domain

- **Manage Contract Management Employee Info (CTMEMPL)**

  The application now displays up to **255** characters in **Skills Description** field on lookups and queries.

- **Manage Contract Management Vendor Info (CTMVEND)**

The application now displays up to **255** characters in **Skills Description** field on lookups and queries.

Materials Management Domain

- **Manage Labor Classifications (RUMLABCL)**

  The application now displays up to **255** characters in **Skills Description** field on lookups and queries.

- **Manage Labor Operations (RUMLABOP)**

  The application now displays up to **255** characters in **Skills Description** field on lookups and queries.

- **Manage Work Centers (RUMWCM)**

  The application now displays up to **255** characters in **Skills Description** field on lookups and queries.

- **View Routings (RUQROUT)**

  The application now displays up to **255** characters in **Skills Description** field on lookups and queries.

People Domain

- **Employee Personal Info (ESQEMPLPERINFO)**

  The length of the **Skill Description** field increases from 30 to **255**. The Skill Description field allows viewing of the full field.

- **Knowledge (HTMKNOWLEDGE)**

  The length of the **Skill Description** field increases from 30 to **255**. The Skill Description field allows viewing of the full field.

- **Manage Detail Position Descriptions (HPMDPOS)**

  The application now displays up to **255** characters in **Skills Description** field on lookups and queries.

- **Manage Education, Skills & Training Data (HPMEDS)**

  The application now displays up to 255 characters in **Skills Description** field on lookups and queries.

- **Manage Functional Position Descriptions (HPMFPOS)**

  The application now displays up to 255 characters in **Skills Description** field on lookups and queries.

- **Manage Skill Codes (HPMSKILL)**

  The length of the Skill Description field increases from 30 to **255**. The **Skill Description** field now allows you to edit and view the full field.

  A new **Talent Management Active Flag** check box allows you to indicate if the skill code is active in Deltek Talent Management. This setting will be used when the ability to transfer of skills information to Deltek Talent Management is available.

- **Print Job Title Position Description Report (HPRPOS)**

The Skills Description field in the application's work table increased from 30 to 255. The report can now display the increased Skills Description field length to 255 characters.

Employee Status Field in Team Management Screens

Multiple screens in the Costpoint Team Management module now provide a new Status field which displays the employee's status code (S_EMPL_STATUS_CD) from the Employee (EMPL) table record. You will also be able to use the Status field when searching records using the Query and Lookup functionalities in the updated screens.

This enhancement is implemented in the following Team Management screens:

- Citizenship (HTMCITIZENSHIP)
- Employee Security (HTMGOVDOCUMENTS)
- Leave (HTMLEAVE)
- Life Events (HTMLIFEEVENTS)

Costpoint Payroll Toolkit

This release adds a new menu item in Costpoint Payroll under the Payroll Utilities application group. Currently, the screen has no functionality. However, In the event of a payroll issue, this update allows Deltek to quickly deploy fixes that require payroll users to run a one-time toolkit.

Print Quarterly State Unemployment Report Based on Pay Period Dates

Prior to this release, the Print Quarterly State Unemployment Report (PRRSTTAX) screen only used check dates as the basis of selecting records from the Employee Earnings table for reporting SUTA wages and employee counts. The application did not include the Employee Earnings record in the employee count if the check date on the record did not fall within the date range and payroll year specified on the screen.

As a result of this limitation, even if the pay period of the Employee Earnings record fell within the specified date range on the screen, the application did not include the record when the check date was outside the specified date range.

To address this issue, the Print Quarterly State Unemployment Report screen provides a new Use Pay Period Dates to Select Records from Employee Earnings check box. When you select the new check box, the application will include Employee Earnings records which have pay period dates that fall within the report's date range parameter and it will not use check dates to select records. If you do opt not to select this check box, the application will select records based on check dates.

> **Note:** Costpoint disables the new **Use Pay Period Dates to Select Records from Employee Earnings** check box if you select the Use Reference Date for **X**, **Y**, **Z**, **V**, and **W Records (Applies to Taxes only)** check box on the Configure Payroll Settings screen.

Export Skills and Offboarding Data to Deltek Talent Management

This release provides multiple Costpoint - Deltek Talent Management integration enhancements which include the following:

- You now have the ability to transfer skill codes to Deltek Talent Management through the Transfer Talent Management Data (EMPHRSDAT) screen. The following check boxes in the Export group box of the screen allow you to enable this new functionality:
  - Skills — Select this check box to include skill codes in the export to Deltek Talent Management.
  - Log Skills Export Transactions — Select this check box to record skills data export transactions in the process log file.
- When you export employee information, the process now sends the following offboarding fields to Deltek Talent Management:
  - user_rehire_eligibility_id
  - user_termination_reason
  - user_separation_reasons
  - user_original_email
  - user_separation_comments
  - wizard_target_id
- When you import employee information, the Employee Type Code (S_EMPL_TYPE_CD) field value now comes from the requisition_job_type column in Deltek Talent Management. Prior to this update, the application used the value from the job_type column in Deltek Talent Management.

Regulatory and Compliance

For year-end and all other regulatory documentation, see the Release Notes page of the Costpoint Cloud Information Center.

Materials Management

MO Completion Option

There are instances that prior to you completing the manufacturing order (MO), you have other activities that you need to do and would not want the MO to be completed automatically.

This feature provides you an option to set the MO completion manually on the Configure Production Control Settings screen.

Administration Domain

This section includes summaries of the changes made in relation with the MO Completion Option feature within the Costpoint Administration domain.

Set Up Company (SYPCOMP)

When you add a new company, the application now checks if the new **Suppress Automatic MO Completion upon Full Relief** check box, on the Configure Production Control Settings screen has been selected or not.

Materials Domain

This section includes summaries of the changes made in relation with the MO Completion Option feature within the Costpoint Materials domain.

Configure Production Control Settings (PCMSET)

The screen has a new check box, **Suppress Automatic MO Completion upon Full Relief**, to prevent the manufacturing order (MO) status to change to **Completed** when items/quantities have been fully relieved.

Enter Manufacturing Order Reliefs (PCMRELMO)

This application has been changed so that for regular positive relief with a completed quantity that is greater than or equal to the build quantity; the MO status will not be set to **Completed** if you selected the new **Suppress Automatic MO Completion upon Full Relief** check box on the Configure Production Control Settings screen. In addition, the system will not delete the reservation associated with the relieved MO until you have set the status to **Closed**.

On the other hand, if the new completed quantity for a regular positive relief is greater than or equal to the build quantity, and you did not select the **Suppress Automatic MO Completion upon Full Relief** check box, the following message displays: "The MO status will be set to Completed because all units are completed." The status will then be set to **Completed**.

Vendor Classifications

On the Print Purchase Order Activity Report screen, the Use PO Line Business Size check box now defaults to selected. If you clear the check box, Costpoint displays a warning.

In addition, if this check box is cleared, Costpoint calculates the summary amount totals based on the vendor's default business size. The calculation logic has been modified as well to use the vendor classification values from the PO line, instead of the vendor.

Vendor Lead Time

Previously, when you selected the shop floor calendar, the Material Requirements Planning (MRP) used the Shop Floor calendar for all aspects of planning. This did not give you visibility into the vendors' calendar and did not give a clear timeline to order and due dates of buy parts.

This feature adds an option for buy parts activity to use the standard calendar for vendor lead times as opposed to using the shop floor calendar.

Administration Domain

This section includes summaries of the changes made in relation with the Vendor Lead Time feature within the Costpoint Administration domain.

Set Up Company (SYCOMP)

When you create a new company from an existing company, the new company will have the same option selected for **Purchasing Vendor Lead Time Calculation** as the existing company.

Materials Domain

This section includes summaries of the changes made in relation with the Vendor Lead Time feature within the Costpoint Materials domain.

Configure Purchasing Settings (POMSET)

You now have the following calendar options to select from when calculating purchasing vendor lead time:

- Standard Calendar
- Production Control Settings

Select the **Standard Calendar** if you want to use the standard calendar to calculate the purchasing vendor lead time; otherwise, select the **Production Control Settings** option if you prefer to calculate the vendor lead time as specified on the Configure Production Control Settings screen.

> **Note:** This new setting only applies to purchasing vendor lead times. All other purchasing related lead times (planning, buyer, receiving, and inspection) will continue to use the lead time calculation option specified on the PC Settings.

Update Material Requirements Plan (MRPMRP)

This application now uses the **Purchasing Vendor Lead Time Calculation** options on the Configure Purchasing Settings screen instead of the one from the Configure Production Control Settings screen for obtaining the order date and target place date of planned orders.

Compute Material Requirements (PCPMRR)

This application now uses the **Purchasing Vendor Lead Time Calculation** options on the Configure Purchasing Settings screen instead of the one from the Configure Production Control Settings screen for obtaining the target place date populated on the requisition lines.

Update Master Production Schedules (MSPMPS)

This application now uses the **Purchasing Vendor Lead Time Calculation** options on the Configure Purchasing Settings screen instead of the one from the Configure Production Control Settings screen for obtaining the order date and target place date as well as determining if the planned order's due date is within the MPS time fence.

Manage Master Production Schedules (MSMMPS)

This application now uses the **Purchasing Vendor Lead Time Calculation** options on the Configure Purchasing Settings screen instead of the one from the Configure Production Control Settings screen for obtaining part lead time and determining if the planned order's due date is within the MPS time fence.

Create Purchase Requisitions from Sales Orders (OEPGRQ)

This application now uses the calendar specified on the Configure Purchasing Settings screen instead of the PC settings. In addition, this application now uses the **Purchasing Vendor Lead Time Calculation** options on the PO settings for calculating the target place date in the requisition line (based on SO line Ship by Date).

New Vendor Classifications

See details in the Accounting section for the new vendor classification fields.

Increase the Length of Skills Description Field

This Costpoint release increases the length of the **Skill Description** (SKILL_DESC) field in the Costpoint Skill (SKILL) table from 30 to **255** to match the size of corresponding field in Deltek Talent Management. This change is in preparation for a future enhancement that will allow you to transfer employee skills information from Costpoint to Deltek Talent Management.

To see the details of the affected screens, please see the People section.

NAICS Codes

The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. (https://www.census.gov/eos/www/naics/)

NAICS United States is used by U.S. statistical agencies to facilitate the collection, tabulation, presentation, and analysis of data relating to establishments in order to provide uniformity and comparability in the presentation of statistical data describing the U.S. economy.

A new requirement (FAR clause 52.219-9) of our procurement customers is to be able to report the vendor's NAICS information on a PO for a government contract, regardless of business size. One vendor can have many NAICS codes apply to them based on their output.

To address this new US government requirement, new applications and fields have been added in the Materials domain to set up and load NAICS codes for goods and services rendered by establishments.

This will allow users to enter their own NAICS codes, and vendors will have NAICS code assigned to them.

Load Supplier Portal Last Action (POPLDACT)

This is a new application/utility (**Materials » Purchasing » Purchasing Utilities » Load Supplier Portal Last Action**) that you can run to populate the blank Supplier Portal Last Action field of PO lines and delivery schedule lines. This action allows the PO lines and delivery schedule lines to be visible on the Supplier Portal screen.

Administration

Costpoint User Interface Improvements

The following updates have been applied to the user interface in Costpoint 7.1.1:

- Borders around subtask windows in the new UI.
- Emphasis on enabled fields.
- Softer background screen colors.

New Vendor Classifications

See details in the Accounting section for the new vendor classification fields.

New Application Menu Items for Automating Database Refresh Process and ODBC Access

The Admin > System Administration menu is updated with new applications for future enhancements to manage ODBC Account setup and maintenance and database refresh requests for Cloud customers. The new menu items are:

- Manage Cloud ODBC Accounts (SCMODBC)
- Manage Cloud Database Refresh Requests (SCMDBREF)

Simplified Sharepoint Content Management Integration Setup

Select the new **Use Automatic Sharepoint Configuration** check box in the **Manage Content Types (SYMCMICT)** application to automatically set up Sharepoint for Content Management Integration, based on recommended best practices.

The Use Automatic Sharepoint Configuration check box is enabled if Sharepoint is the chosen CMS.

If you use this setup option, Costpoint has full administrative control over the associated Sharepoint site to create document libraries, content types, and columns. Repository, Content type, Base Folder, and Attachment Property fields become disabled.

After you save the automatic configuration, Costpoint populates the fields with references to automatically created objects in Sharepoint:

- The newly created Sharepoint library name is titled "Costpoint Library" with the Content Type ID appended to it.
- The Sharepoint Content Type is titled Costpoint Type with the ID appended to it.
- The Attached in Costpoint property is automatically created and assigned to the screen.
- The Base folder is set as root (/). The system assumes that subfolders will not be used in Sharepoint.

Reports & Analytics

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

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

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

- Toggle between the Parameters and Reports tabs to add (open) and remove (close) dashparts that you want to view.
- Drag the dashpart table windows up or down on the Parameters tab to rearrange the dashparts. Costpoint displays the dashparts on the Reports tab in the order that they appear on the Parameters tab, first to last.

- Set your screen resolution to 1920 pixels, which is the recommended resolution to view all dashparts. Note, however, that if your screen does not support 1920 pixels, you will not be able to set that resolution.

Costpoint Integration

There are no changes to Costpoint Integration planned for this month.

Heading

Text

Planning

Organization Budgeting

No features are currently planned for the upcoming release in this area.

New Business Budgeting

Proposal Budgeting Replaced by New Business Budgeting

The Proposal Budgeting module was redesigned and replaced with a new module named New Business Budgeting.

As part of the redesign, the applications that were used to create proposal and non-backlog budgets were merged into a single new application, which is opened by clicking **Planning » New Business Budgeting » Actions/Processing » New Business Budgets**.
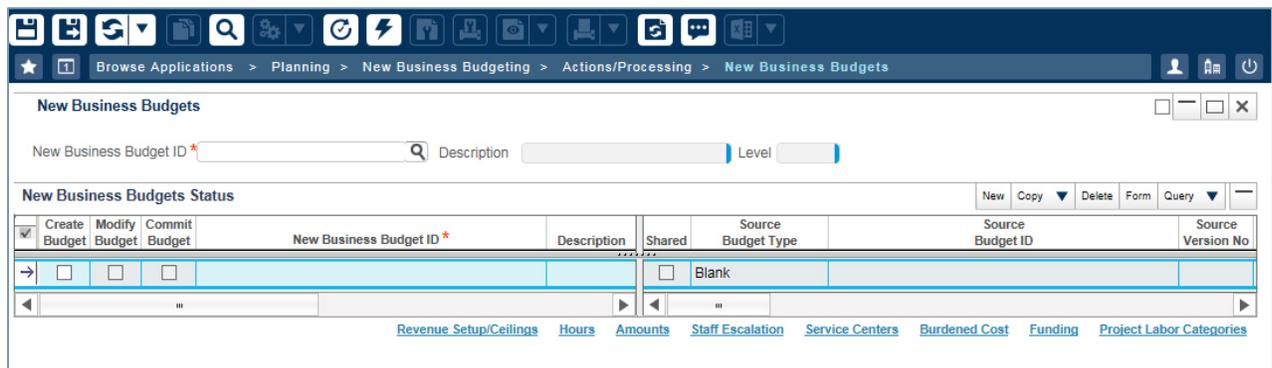
Because the New Business Budgets application incorporates the full range of functionality previously offered from several separate screens, the following applications no longer exist:

- Create Proposal or Non Backlog (NPI1, NPI3, NPI6)
- Project Proposals (NPI4)
- Project Non-Backlog Budgets (NPI7)
- Change Structured Proposal Start Date NPI10

Updated Menu Structure and Labeling

Instances of "Non-Backlog" and "Proposal," either in the menu structure or in field labels, have been replaced with "New Business Budget." For example, the Create Budget from Proposal (NPI8) application, which remains within the new module, was renamed to Create Project Budget from New Business Budget (NPI8).

Where the Help topics may have previously made generic references to "proposals," "proposal budgets," or "non-backlog budgets," all equivalent instances now and in future releases will be referred to as "new business budgets."

The revised menu includes New Business Budgets and Create Project Budget from New Business Budget (NPI8):
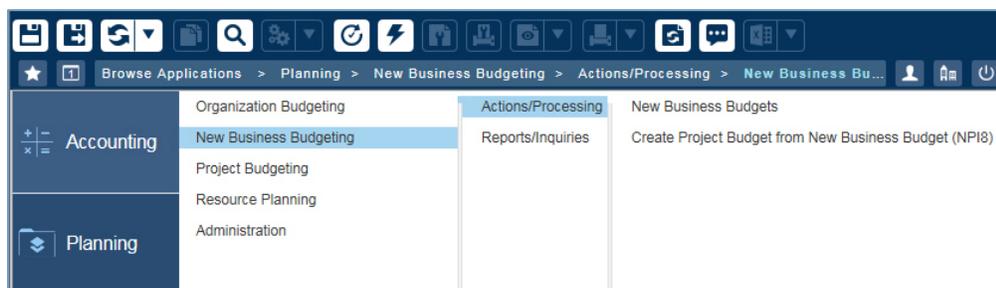
Overview: New Functionality and Other Changes

The table below provides an overview of key improvements and other functionality changes. Where applicable, refer to other topics within this document for additional information or detailed instructions.

Feature or Change	Description
Work Breakdown Structure Requirement	Previously you could enter budget details only at the contract level. You can now enter the entire budget structure and choose the level at which you want to budget. See the "Create the Work Breakdown Structure for a New Business Budget" procedure later in this document.

Create any budget type from scratch	All budgets for new business can now be created from scratch. Previously, you could create proposals from scratch, but non-backlog budgets could be created only from a proposal or another non-backlog project budget.
	
	When you create a budget, you will be able to choose from the following Work Type designations:
	
	   ▪ Add On –Previously applied to non-backlog budgets.
	
	   ▪ New Work – Previously applied to describe non-backlog budgets.
	
	   ▪ Proposal – Previously applied to describe proposal budgets.
	
	In future releases, other designations will be added as well as the ability to create user-defined labels.
	
	Regardless of which Work Type you select, you have the option to create a budget from scratch by selecting "Blank" from the **Source Budget Type** drop-down list.
	
	See the "Create a New Business Budget" procedure later in this document.

Create, Modify, Commit, and Delete Functionality	Previously, you created proposal and non-backlog budgets from the Create Proposal or Non Backlog (NPI1, NPI3, NPI6) screen, and then entered or modified the budget details from either: ▪ Project Proposals (NPI4)

Feature or Change	Description
	▪ Project Non-Backlog Budgets (NPI7)

You can now perform all functions related to budgeting from the New Business Budgets screen.

As part of this update, the Create, Modify, and Commit buttons were converted to check boxes.

After you select the check box, click . You will no longer receive a message indicating that the requested change is being processed. This change is similar to standard functionality in other Costpoint screens.

To delete, you will use the standard Delete button that displays on all Costpoint tables.

Select the row you want to delete, click , and then click .

Note: When deleting levels of the WBS or budgets, you must always delete the lowest level first, or if you are deleting multiple rows, the lowest level must be included. |
| **Conversion of earlier non-backlog and proposal budgets** | Your existing non-backlog and proposal budgets were merged into New Business Budgets. They can be used as a source for any new business budget that you create.

See "Using Migrated Backlog and Proposal Budgets" later in this document for more information. |
| **Consolidation of Budget Sheets** | To improve the budget entry process, multiple subtasks were consolidated within two new subtasks: Hours and Amounts.

See "Budget Subtask Consolidation" later in this document for details. |
| **New Business Budgets added to Budget by Resource** | In **Planning » Resource Planning » Budget by Resource** the following changes were made to fields in the Add/Edit/Delete Assignments Subtask:

Type – References to Proposal and Non-Backlog were updated to "NB" |

Feature or Change	Description
	Source - References to Proposal and Non-Backlog were updated to "NB (New Business)"

Create the Work Breakdown Structure for a New Business Budget

Before you can create the budget and enter budget details, you must first create the work breakdown structure (WBS). You will create the WBS in the New Business Budgets Status table of the New Business Budgeting screen.

Each level of the work breakdown structure (WBS) is represented by a separate segment of the New Business Budget ID, and each segment is separated by a period (.).

The first segment (parent segment) must conform to the five character length established for all Costpoint projects. Each subsequent segment must conform to the length configured for that level of the WBS, so for example, the ID for a three-level WBS might appear as follows: 12345.123.12.

Segment lengths are configured in Costpoint from **Projects » Project Setup » Project Setup Controls » Configure Project Settings » Project Segment Lengths**.

When creating the WBS, you will create a row for each segment of the ID. For example, if you plan to budget at the lowest level, and the project is configured for up to three levels, you will create a total of three rows in the table.

To set up the work breakdown structure for the new business budget:

1. Click **Planning » New Business Budgeting » Actions/Processing » New Business Budgets**.

2. In the **New Business Budget ID** field, clear any previous value from the field and enter the ID for the parent segment.

3. Click 🔧 to clear any remaining values from a previously displayed budget and to ensure that the ID does not already exist.

4. In New Business Budgets Status table, click New to create the first row.

    The ID you entered automatically displays in the **New Business Budget ID** field of the table. This is the top level of the work breakdown structure.

5. In the newly created row, enter or select values in the following required fields: Start Date, End Date, Org ID, and Account Group. You can optionally enter values in Description, Probability, Escalation, and Note.

    Other fields in the row are inactive until the budget is created.

6. Click 💾 .

    With the first level of the WBS established, you can add more levels or create the budget at this level.

7. To add another level to the work breakdown structure, do one of the following:

- Click [New] in the New Business Budgets Status table to add a new blank row.

- Select the first row and click [Copy] to add a row that contains all the same information.

8. In **New Business Budget ID**, enter the ID for this level (segment) of the WBS, or if you copied the previous row, modify the value.

   Each segment of the ID must conform to the established length for that level and must be separated from the previous level with a period (.), for example: 10001.1111.

9. Enter or select values in the required fields or modify the existing values if you copied the previous row.

10. Click 💾 .

11. Decide the following:

    - Budget at this level of the work breakdown structure. See "Create a New Business Budget" below for instructions.

    - Add more levels to the work breakdown structure. Repeat steps 7-8 for each level you want to add.

If you need to delete a level from the work breakdown structure, you are required to delete the lowest level first. You can delete multiple levels at the same time, provided the lowest level is included.

Create a New Business Budget

After the WBS is established, you are ready to create the budget.

To create a new business budget:

1. To display the New Business Budgets application, click **Planning » New Business Budgeting » Actions/Processing » New Business Budgets**.

2. In the **New Business Budget ID** field, enter the parent budget ID or click 🔍 to select it, if the ID is not already displayed.

3. Click 👆 on the toolbar.

   The WBS of the budget displays in the New Business Budgets Status table. The Level column indicates the WBS hierarchy. For example, if you created a WBS with three levels, there will be a row for each level, numbered 1, 2, and 3.

   Important: You can only budget at one level of the WBS.

4. In the New Business Budgets Status table, identify the row (WBS level) where you want to enter budget details and select the **Create Budget** check box in that row.

5. In **Description**, if you did not enter a description when you created the WBS, enter a value that describes this level of the budget. This field is optional.

6. Click **Shared** to share the budget. This is optional.

7. In **Work Type**, select a work type for the budget. Choose from options such as Add On, New Work, or Proposal. This field is required.

8. In **Source Budget Type**, select the source you want to use to create the new business budget. This field is required. Options include the following:

- **Blank** - Select this option to create it from scratch. If you select this option, there are no other required fields to complete in the New Business Budget Status table, and you can begin entering budget details by selecting any of the subtasks.

- **Project Budget** - Select this option to create it from a project budget.

- **Project EAC** - Select this option to create it from a project EAC.

- **New Business** - Select this option to create it from another new business budget.

9. In **Source Budget ID**, select the ID number of the source budget. This is required field, unless you selected Blank as the Source Budget Type.

   After you select the ID, the following fields populate automatically based on the selected source:

   - Source Version Number

   - Source Work Type fields

   - Start Date

   - End Date

   - Periods

   - Weeks

   - Escalation

   - Org ID

   - Account Group

10. Click 💾 .

    With all the required fields completed in the New Business Budgets Status table, you can now enter or modify budget details using any of the subtasks. See "Consolidation of Labor Subtasks" below for new changes to labor-related budgets sheets.

Using Migrated Non-Backlog and Proposal Budgets

Your previously existing non-backlog and proposal budgets were migrated to New Business Budgets. They are available for use as a source budget, when you create a new business budget.

To use a migrated budget as the source for a new business budget:

1. Click **Planning » New Business Budgeting » Actions/Processing » New Business Budgets**.

2. Follow all the steps described for creating the WBS.

   See "Create the Work Breakdown Structure for a New Business Budget" earlier in this document for instructions.

3. In the New Business Budgets Status table, identify the row (WBS level) where you want to enter budget details and select the **Create Budget** check box in that row.

4. In **Description**, if you did not enter a description when you created the WBS, enter a value that describes this level of the budget. This field is optional.

5. In **Work Type**, select a work type for the budget. Choose from options such as Add On, New Work, or Proposal. This field is required.

6. Click **Shared** to share the budget. This is optional.

When you select the source for this budget, the field will be updated based on the setting in the migrated proposal or non-backlog.

7. In **Source Budget Type**, select **New Business.**

8. In **Source Budget ID**, click 🔍 to select the migrated non-backlog or proposal budget that you want to use as the source for the new business budget.

9. Click 💾 .

Values in the table are updated based on the source you selected.

With all the required fields completed in the New Business Budgets Status table, you can now enter or modify budget details using any of the subtasks.

Budget Subtask Consolidation

To simplify the budget data entry process, multiple budget subtasks were consolidated into two new subtasks: Hours and Amounts.

| Revenue Setup/Ceilings | Hours | Amounts | Staff Escalation | Service Centers | Burdened Cost | Funding | Project Labor Categories |

The Hours and Amounts subtasks include a new column, where the former subtasks now display as list values. A second column, also new, displays related values.

In the first column of either subtask, you select the general type of hours or amounts you want to budget, and then in the ID Type column, you select the specific type. For example:

Hours Subtask Table	Amounts Subtask Table

For your reference, the screen images above display all the ID Type values. However, after you select a value from Hours Type or Amounts Type, the ID Type list updates accordingly. For example, if you choose Materials from Amounts Type, the ID Type list only includes Key Entry and Vendor.

Lookup values for all other columns in the table (for example, Name, Acct ID, Org ID) also filter based on the values you selected in the first two columns.

Import New Business Budgets from Excel Added to New Business Budgeting

A new **Planning » New Business Budgeting » Controls and Utilities » Import New Business Budgets from Excel** application was added that enables you to import multiple new business budgets from Excel and then upload them to the New Business Budgets application.

> There is a prerequisite for the New Business Budget work breakdown structure (WBS) to already exist before budget data can be uploaded. The user should create the WBS ahead using the New Business Budgeting application before importing the budgets from excel. The import process will not create the WBS.
>
> For more information, click **Help** from the New Business Budget screen in Costpoint Planning and see the *Set Up the Work Breakdown Structure* help topic.

From Import New Business Budgets from Excel application, you can do the following:

- Download the pre-formatted Excel template.

- Upload data from Excel to Costpoint Planning.

- Select error reporting and duplication parameters, and after the upload is finished, review the results in the Upload Report subtask prior to uploading the data to the New Business Budgets application.

- Review errors using the Error Report subtask.

- Commit multiple new business budgets simultaneously to Costpoint Planning.

For example,

Use these drop-down lists to specify parameters for handling duplicate new business budgets and errors.

Use this field to specify the Alternate File Location where the .xml file is saved.

Use this field to select the budget .xml file for processing by Costpoint.

Use this subtasks to display your uploaded report results, view error report and download the Deltek formatted Excel template.

Note that this application is functionally similar to the existing **Project Budgeting » Controls and Utilities » Import Budget/EACs from Excel** utility, which was released in 2018. If you have used that screen to import Project budgets/EACs, you will find that the process for importing new business budgets is the same except for the following differences:

- You need to create a work breakdown structures (WBS) for any budgets/EACs you plan to import. If you are not familiar with creating the WBS, see online Help for **Planning » New Business Budgeting » Actions/Processing » New Business Budgets**.

- Field names reflect New Business Budgeting.

- Column Name was changed to Budget ID.

- When **If a New Business Budget already exists, do you want validations to create an error when Uploading File?** is selected as **No**, the options under **If a New Business Budget already exists, do you want to** are as follows:

  - **Overwrite complete Budget —**the budget for the entire period of performance, including past, current and future periods, will be overwritten by the .xml uploaded file.

  - **Overwrite budgeted periods in Template only —**the existing budgeted periods will be overwritten by the budgeted periods on the template. Periods without budgeted amounts on the template will not overwrite any existing budgets in those periods.

> For additional information on using this application, click **Help** from **Planning » New Business Budgeting » Controls and Utilities » Import New Business Budgets from Excel**.

Import New Business Budgets Configuration Update

An **Import New Business Budgets from Excel Commit Flag Default** check box was added to **Planning » Administration » Administration Controls » Configuration Settings (MAM10) » Project tab**.

When you select this option, the **Commit** check box on the Upload Report subtask of the Import New Business Budgets from Excel application is selected by default, but the user can change the status.
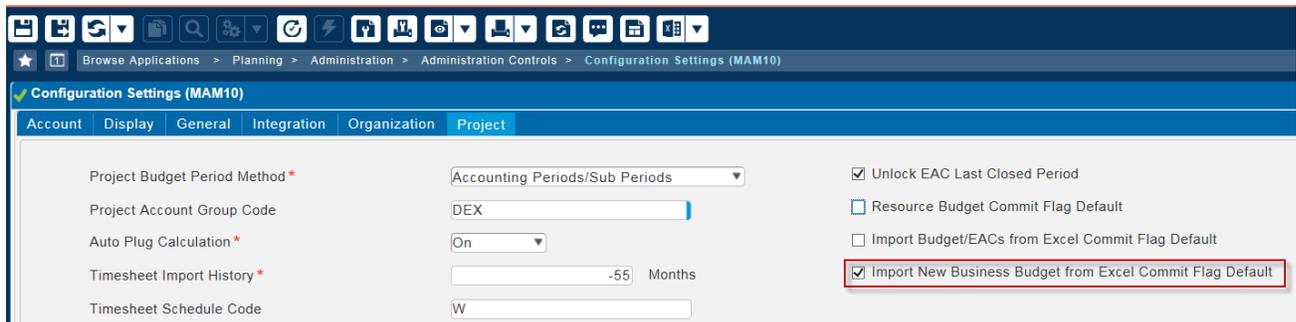
Report Consolidation

Within **New Business Budgeting » Reports/Inquiries**, the Proposal Summary NPT1 report and Non-Backlog Budget Revenue Summary NPT2 reports were consolidated into a new, single report called New Business Budget Summary (Revenue/Cost).
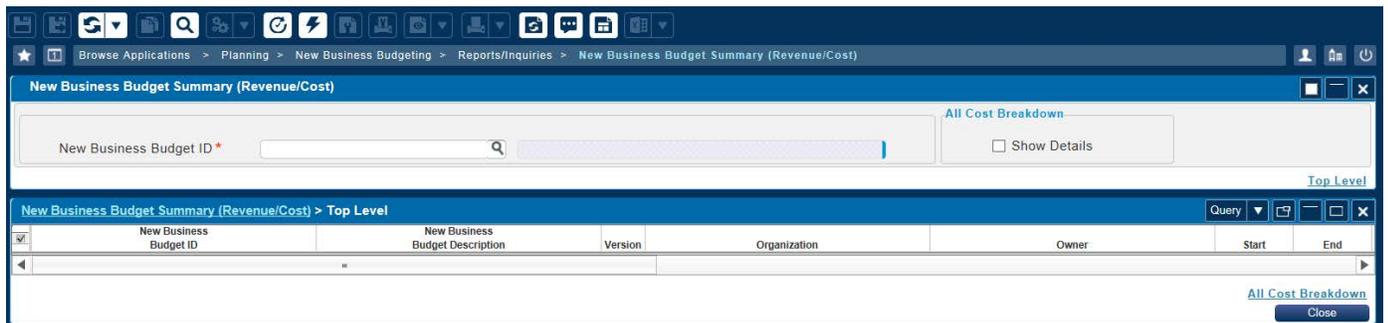
Use this new report to select a top level New Business Budget ID and to view a summary of revenue, profit, and cost categories for the budget hierarchy. Click the **All Cost Breakdown** subtask to drill-down into the details of revenue, cost categories and burdens over the budget period of performance.

For more information, click **Help** from the New Business Budget Summary (Revenue/Cost) screen in Costpoint Planning.

Burden Template Functionality Added to Planning

For this release, Costpoint Planning was enhanced to include the Manage Burden Templates and Import Pools to Burden Templates applications from Advanced Project Budgeting in Costpoint. These applications enable you to create new or import cost pools from Costpoint to use for calculating burden for a budget or EAC.

Previously, the pool setup from Costpoint was used by default and only one burden template was available per budget. Now, the current Fiscal Year Pools from Costpoint can still be used by choosing the 'Default' template but there is an option to use a different Burden Template. Also, different Burden Templates can be used for different Budget or EAC Versions or on different Project Budget nodes.

The Manage Burden Templates and Import Pools to Burden Templates applications were added to the following areas of the Planning module:

- Project Budgeting » Controls and Utilities » Project Budget Burden Template Controls
- New Business Budgeting » Controls and Utilities » New Business Budget Burden Template Controls

Note that no screens were recreated. The burden template functionality was already existing in Costpoint Advanced Project Budgeting but is now available in Planning.

Use the Manage Burden Templates application to manually set up different templates. To create the Pool Base, you can manually set up the Accounts and Orgs, or use Wildcarding. You can also Import Pool Base from an existing Costpoint Allocation Group, Fiscal Year and Pool.

The Import Pools to Burden Template application allows the Pools to be imported from Costpoint Pools. Once the templates exist, they can be edited in Manage Burden Templates.
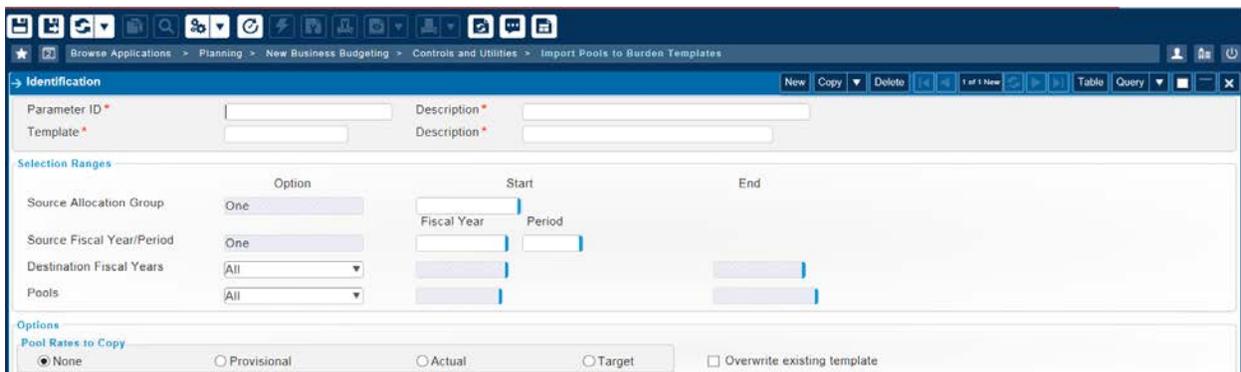
Refer to the online help for more information on how to use these applications.

Apply a Burden Template to a Budget

To enable you to apply a burden template to a budget, a Burden Template column was added to the Status table in both Project Budgets/EACs and New Business Budgeting.

Note that the Burden Template column is only enabled for budgets that have a status of **Working**.
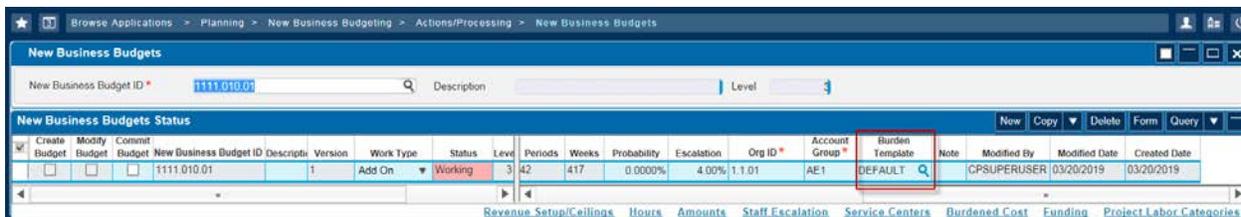
The Burden Template lookup allows you to select which template to use on budgets. You can use DEFAULT template which uses the **Current FY Pool Configuration** or select from existing burden templates including the ones that you setup in Manage Burden Templates application.

When you save or commit the Budget/EAC, the burden will be calculated using the selected template in the Burden Template column if the fiscal year of that template is equal to or greater than the current fiscal year. If the selected template has records with less than the current fiscal year then the DEFAULT template will be used in calculation even if a different burden template was selected.

To check the fiscal year, go to **Planning » Administration » Administration Controls » Maintain Current Period**.

For example, if the Current Fiscal Year is 2016, any burden template selected with records dated 2016 and above will be used in calculation but if the selected template has records 2015 or earlier then the DEFAULT template will be used to calculate burden.
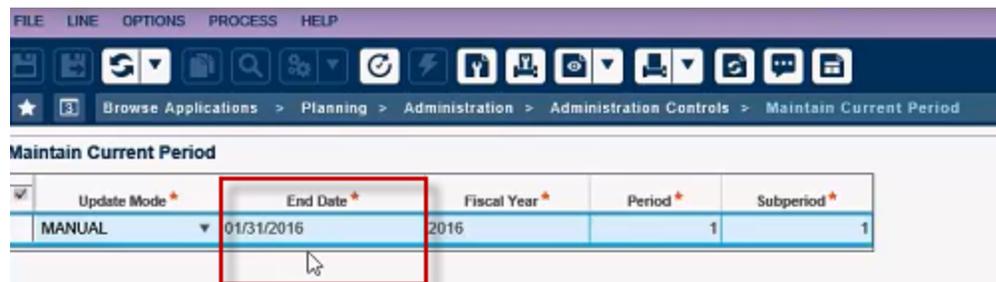
Project Budgeting

See the "Burden Template Functionality Added to Planning" feature description above under New Business Budgeting. This feature applies to Project Budgeting as well.

Ability to Create Budget From EAC Added to Project Budgets/EACs

You can now extend your Project Budget periods and create a new Budget version from your current EAC for the new periods. Wage escalation occurs from the current period only and the past periods remain as Actual.

To Create a Budget from EAC, complete the following steps:

1. Go to **Planning » Project Budgeting » Budget/EAC Processing » Project Budgets/EAC.**

2. Highlight a row with an approved EAC. You will notice that the **Create Bud** action button is now available.

3. Click **Create Bud** to create a Working status Budget with a sequential version number from the last Approved Budget.

   - The new Working Budget displays actual costs up to the current period. It includes the source EAC forecast to the end date. This end date is editable and can be extended.

   - The actual costs in the new Budget includes actual labor rates, up to the last closed period. Escalation will applies to those rates in current and future periods.

Update to Configuration Settings (MAM10)

Currently, when an EAC is created it brings actual costs into the budget up to the last period. For this release, Configuration Settings (MAM10) was updated to include an option to **Unlock EAC Last Closed Periods.** Selecting this option enables you to edit the last closed period actuals.

This flag also allow edits to the last EAC period in the source EAC version used to create the new Budget version. You can now update late last period entries and audit changes in the new Budget version.
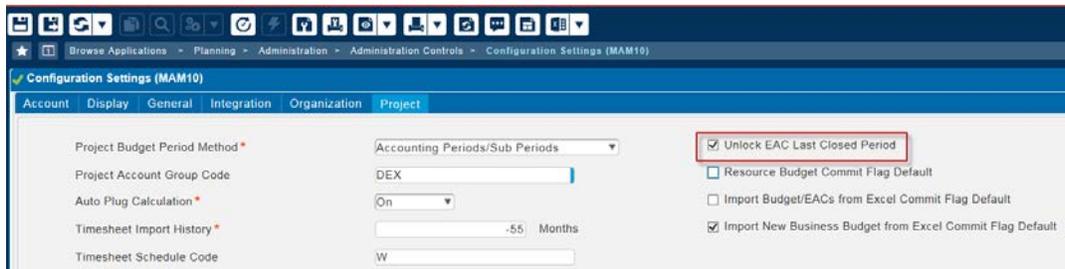
Rollup Applied to Project Budgets/EACs

In the Project Budgets/EACs screen, amounts entered in **Distributed Rev** and **Budget Rev** at lower levels of the project are now summarized at the top level.

During rollup, if EACs and budgets are both present, the EAC always takes precedence and is rolled up instead of the budget. This is true even if the budget is more recent than the EAC. After Costpoint Planning determines which one to use, the amount is rolled up regardless of whether the budget/EAC status is Incomplete, Complete, Approved, or Working.

Resource Planning

No features are currently planned for the upcoming release in this area.

Administration

Update to Configurations Settings (MAM10)

The Configuration Settings (MAM10) was enhanced and the configuration setting **"Allow EAC creation prior to period close"** is now included.

Users can now select from the following options:

- Create EACs based on Last Closed Period (Standard Function)
- Create EACs based on Current Period

To select these options, go to **Planning » Administration » Administration Controls » Configuration Settings (MAM10) » Project** Tab
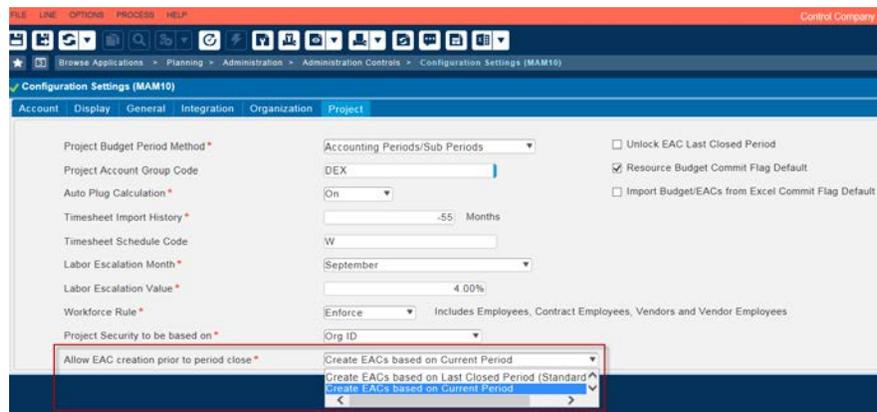
Currently, the system defaults to **Create EACs based on Last Closed Period (Standard Function)**. This means that when you create an EAC, the date will be based on the maximum End Date from Maintain Fiscal Periods (MAM8,MAM9) and less than the current FY/PD (Maintain Current Period).

When you select **Create EACs based on Current Period**, the end date that will be used when you create an EAC is the current period as specified as the **End Date** in Maintain Current Period application.

For Example:

1. Go to Configuration Settings (MAM10) **»** Project Tab.

2. In the **Allow EAC creation prior to period close** drop-down menu, select **Create EACs based on Current Period.**

3. Click 🖫.

4. Go to **Project Budgets/EACs »** click **Create EAC**.

The Closed Period date displayed will be the End Date in Maintain Current Period application.

You do not need to Refresh the application for the changes in configuration to take effect.

Also, when the **Create EACs based on Current Period** is selected the EAC created from an Approved Budget will bring in Actual transactions in the Current Planning Period and replace the Current Period Budget.

If there are no Actual transactions, the Budget numbers will be removed in the Current Period.

Time and Expense

Time

New *Previous Period* and *Next Period* Timesheet Preview Options

Navigation options were added to the **Time » Manage/Approve Timesheets** application that provide managers options to view read-only versions of their employees' previous and next timesheets.

The following fields were added to the Timesheet Basic Information tab:

- **Total Hours (Previous Period)** – This hyperlinked field, which links to a read-only display of the prior timesheet period, aggregates Cost Only and Non Cost Only hours.

- **Total Hours (Next Period)** – This hyperlinked field, which links to a read-only display of the next timesheet period, aggregates Cost Only and Non Cost Only hours.

Because this functionality is embedded in the **Time » Manage Timesheets** Basic Information tab, employees can also view read-only versions of their previous and next timesheets.

Request Correction Button Hidden

The Request Correction button on processed timesheets in closed periods will now be hidden if the associated workflow events are not enabled.

Workflow Update

Workflow for timesheets was updated so that when timesheets (regular or corrected) are signed or approved from **Time » Time Utilities » Change Timesheet Status**, a corresponding workflow event is also generated requiring the employee to sign and/or manager to approve the timesheet(s).

This is useful when timesheets are signed or approved from the utility, but it is still desirable to have employees or managers review them.

> The programming that supports this functionality was implemented on the backend, and no further action is required by either system or timesheet administrators.

Mobile Charge Lookup Options

To support the forthcoming release of Costpoint Mobile Time, a **Mobile Lookup Options** section was added to the **Time » Time Controls » Manage Timesheet Classes screen.**

Use the options in this section to manage the type of charges available for lookup, when users enter hours in the mobile version of the timesheet application.

Choose from the following options:

Field	Description
Show Project	Select this option to enable employees of this timesheet class to select UDT02-related charges when completing their timesheets.
Show MO	Select this option to enable employees of this timesheet class to select MO-related charges when completing their timesheets.
Show Account Tab	The Account tab provides a list of charges with UDT01 (not UDT02).

Expense

First and Last Day Trip Meals Enhancement

On the Details tab for meal expenses in Manage Expense Report, users now have the option of designating the Start Date as the first day of the trip and/or designating the End Date as the last day.

> This functionality is enabled on the expense report only for per diem expenses and if **Allow Override of Trip Start/End Dates** is selected in **Expense » Expense Controls » Manage Expense Types**.

When **Allow Override of Trip Start/End Dates** is selected, and the Expense Type is one designated as per diem, the **First Day of Trip** and **Last Day of Trip** check boxes are enabled on the form.

If the reimbursement period for meals (for example, Monday – Friday) is not the same as the start/end dates of the overall expense report (for example, an entire month), the employee can apply the correct dates for meals on the Details tab, and then designate the dates as either the first or last day, respectively.

This scenario may be desirable when, for example, an employee is on an extended business trip, but weekends are not included, and you want to ensure that meals are reimbursed correctly, such as when the last meal is reimbursed at 75% on the last day.

Configuration

There were no changes in this area.

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