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Deltek

Costpoint 8.0

Pre-Release Notes

July 2, 2020



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Disclaimer

The scope of these pre-release notes is subject to change.

Important Notice

These pre-release notes provide overview descriptions of enhancements planned for the upcoming Costpoint 8.0 release. This document lists the currently planned work, but the actual scope and contents could change prior to the release. Please use this document for guidance only.

Accounting

Add GSA's Unique Entity Identifier (UEI) to Vendor Master

The Dun & Bradstreet (D&B) Data Universal Numbering System (DUNS) that is currently used as a unique identifier for vendors doing business with the government will be replaced by a new Unique Entity Identifier (UEI) generated in the System for Award Management.

The Manage Vendors (APMVEND), Manage Subcontracts (CTMSBCNTR), and the Contract Management Vendor Info (CTMVEND) screens will be updated to have a **UEI Number** field, and **DUNS Number** will be retained for historical purposes and commercial needs only.

The UEI Number column will be added to the Vendor Input File that is used when importing vendors using the Import Vendors (AOPUTLVU) screen.

Enhancement to AP 1099 SSN Suppression

Multiple Accounting screens will be updated to enable the suppression of a vendor's Tax ID, depending on the settings in Manage Users (SYMUSR).

This update will affect the following screens:

- Edit 1099 Information (APM1099)
- Import Vendors (AOPUTLVU)
- Manage Vendors (APMVEND)
- Print 1099 Edit Report (APR1099E)

If both **Suppress SSN** and **Suppress AP Tax ID** are selected in Manage Users, the **Tax ID** is suppressed when you open or print reports on the affected screens.

If only **Suppress SSN** is selected and you select a vendor that is an employee of the company, the **Tax ID** is suppressed. Otherwise, if only **Suppress SSN** is selected and you select a vendor that is not an employee of the company, the **Tax ID** displays when you open or print reports on the affected screens.

Add Message to Identify/Prevent Vouchers Being Reversed Multiple Times

The Reverse Posted Vouchers (APPREVVR) screen will be updated to display an error message in the Reverse Posted Vouchers report when you reverse a voucher that has already been reversed. To check if a voucher has been reversed, Costpoint will compare the voucher number on the screen to the stored original voucher number.

The **Reverse Voucher Even if Already Reversed** check box will be added to the **Reverse to Options** group box. If this check box is selected when you reverse an already reversed voucher, no error message will display in the Reverse Posted Vouchers report.

A new **Voucher Type**, Reversed Voucher, and the **Original Voucher** field will be added to the Manage Accounts Payable Vouchers (APMVCHR) screen to store the original voucher number that will be used when checking if vouchers have been reversed.

The **Original Voucher** field will also be added to the Manage Purchase Order Vouchers (POMPOVCH) and Approve Vouchers (APMVCHRA) screens, and will be included in the report headers when you print a Voucher Edit Report.

Add Receipt Qty to PO Line Lookup in Manage Purchase Order Vouchers

This enhancement adds the Received Qty in the Lookup of the purchase order (PO) line field of the voucher line. This will help you save time and improve efficiency when entering vouchers using received quantity for matching instead of using accepted quantity.

Contracts

Contact and Lead Tracking

You will now be able to track new contacts and leads in Costpoint with key information on status, qualification, source, and rating. A new application is currently being developed to allow you to enter or search for contacts, run queries on contact/lead statuses, and track contact/lead activities. You can also associate these contacts/leads to opportunities and contracts.

CRM Mobile Application

Costpoint will be releasing a new mobile application that will enable you to quickly access information on your opportunities and contracts.

GovWin IQ to Vendor Integration

GovWin IQ currently captures vendor information from SAM.gov, which includes whether or not the vendor is on the government exclusion list and other data such as vendor classification codes. This list identifies those parties excluded from receiving federal contracts, certain subcontracts, and certain types of federal financial and non-financial assistance and benefits.

It is important to have accurate data on the vendors included on this list as it could impact your ability to win an opportunity or receive payment on a contract.

To this end, Costpoint will be releasing a new API integration screen (Import GovWin IQ Vendor Data) that will transfer vendor information from GovWin IQ into Costpoint. This will eliminate the need for duplicate data entry and will ensure that the data is updated with no data entry errors.

Existing screens are also being updated to alert you if the vendor/subcontractor you selected is on the exclusion list, but you will be able to override the warning and save the vendor/subcontractor in the record if needed.

Initiate Purchase Orders and Purchase Requisitions from Manage Subcontracts

This enhancement will allow you to initiate purchase orders (POs) and purchase requisitions (PRs) from the Manage Subcontracts screen. Through the links that will be added to Manage Subcontracts, you will be able to directly access the Manage Purchase Orders and Manage Purchase Requisitions applications in the Materials domain and enter PO and PR information. After you link the PO and PR records to a subcontract record on those screens, Costpoint will then update the subcontract record in Manage Subcontracts with the PO and PR details from those screens.

A new column, **PO Balance Remaining**, will be added to the Purchase Orders tab of Manage Subcontracts. This will display the remaining PO balance for the purchase order linked to the subcontract.

Labor Category Enhancements and Connection with Planning

With this enhancement, you will be able to track labor category requirements and use these to identify resources during the planning process. This will help in matching the requirements of the labor category

to the requirements stored against the active employee or vendor. The labor categories will be shared across opportunities, contracts, and Planning (if in use).

This feature will also allow you to link new business budgets to an opportunity ID, which could then be viewed within Opportunities and Contracts and tracked on system reports. Resources that are used in the budgeting process in Planning can be loaded as teams on the opportunities and contracts and also as a work force on the project.

Note: For additional information on the respective updates in Planning, see [Integration with Costpoint Contract Management](#).

Supplier/Vendor Rating on the Manage Contract Management Vendor Info Screen

Currently, supplier/vendor rating information was available only on the Manage Contracts and Manage Subcontracts screens, with the rating linked to a specific contract or subcontract record. You had to go through each record to see the supplier/vendor ratings.

With this feature, the new Supplier/Vendor Rating tab that will be added to the Manage Contract Management Vendor Info screen will allow you to view consolidated supplier/vendor ratings for a specific supplier/vendor in just one location. This new tab will be a read-only presentation of the ratings on the Manage Contracts and Manage Subcontracts screens. A new **Average Rating** field will also be available on the screen to display the average rating of a specific supplier/vendor. Both the new tab and the new field will be visible only for regular vendors and hidden for prospective vendors.

Projects

Add Hold Status for Standard Bills

A new **Hold** status will be added for standard bills to allow you to keep these bills in a static state after manual adjustments are made after bill calculation. This enhancement will be applicable only to standard bills and not to other bill types. When bills are in a hold status, Costpoint will not calculate/recalculate values for these bills when you compute standard bills. The system will also not post these bills.

Add Task Order Number on Standard and Milestone Bills

Task order numbers will be added to printed standard and milestone bills, letting you avoid manual manipulation of invoices to include the task order number. The option to display the task order number on the header of the bill will be added to the Manage Generic Billing Formats screen. Other billing screens are also being enhanced for this update.

Application Optimization in the Projects Domain

Several applications, particularly those used in batch processing, have been reviewed and updates are being released to process more efficiently and decrease their runtime. These include the following:

- Compute Burden Costs (PJPALEST)
- Compute Revenue (PJPCOMPR)
- Create Project Report Tables (PJPCRRPT)
- Create Unbilled Analysis Report Tables (BLPUNBIL)
- Load Labor Rates (PJPLDRAT)
- Post Revenue (PJPPSTR)
- Redistribute Revenue (PJPBREAL)
- Update Project Status Report Tables (PJPUPPSR)

Planning

Integration with Costpoint Contract Management

Specific areas of New Business Budgeting and Manage Opportunities in Costpoint Contract Management will be integrated to allow sharing of key information between the applications.

For example, from within New Business Budgeting, a new hyperlinked field will allow you to select and link to a specific Opportunity ID. Once the budget and opportunity are linked, you can open and view the opportunity from within the budget.

In addition, the labor categories from the opportunity will be available for selection from within the Advanced Search subtask of New Business Budgeting, enabling you to search for resources that meet the labor category requirements already established on the Team tab in Manage Opportunities.

After you assign hours to the resource(s) and commit the New Business budget, the names and IDs, as well as location information, of the selected resources will automatically populate the Potential Resources Details subtask in Manage Opportunities.

Budget By Resource will also be integrated with Opportunity Management so that when you use Advanced Search from that application, you can choose a specific Opportunity ID and associated Opportunity Labor Category, which will pre-populate the Skills list with the skills from the opportunity.

When hours are assigned and you select a New Business budget that is linked to that same Opportunity, the Potential Resources Details subtask in the Opportunity is updated with resource details after the budget is committed, the same as when the resources are selected from within New Business Budgeting.

As part of this same integration enhancement, the Project Budgets/EACs application will be updated to include the Contract Name and Contract ID from Manage Contracts, as well as the ability to link to and view the contract (read-only).

Note: For additional information on the respective updates in Contract Management, see [PLC Enhancements and Connection with Planning](#).

Advanced Search Updates

When you access Advanced Search from the Budget By Resource application, two new resource types will be available: Contract Employee and Vendor as Resource Types. (Currently, the search is limited to Employee and Vendor Employee.)

Other changes will include the addition of new search criteria, available from Advanced Search in Budget By Resource as well New Business Budgeting and Project Budgets/EACs.

Depending on the Resource Type, the new search criteria available to you will include the following:

- ITAR Required
- Socioeconomic Status
- Location
- NAICS
- US Citizenship Required?
- Clearance

To streamline the selection of criteria, the search category fields will be converted to drop-down lists, and depending on the criterion selected (for example, Manager or Skills), you will be able to select multiple list items at the same time, enabling you to build your search more quickly.

In addition, a new *% Match* functionality will be added to indicate how closely each search result matches the selected search criteria.

Note: Advanced Search in Budget By Resource and New Business Budgeting will display other new fields related to the integration with Costpoint Contract Management. See [Integration with Costpoint Contract Management](#) for details.

What If Scenarios

Planning will be updated to include the ability to create and compare multiple versions of the same budget, allowing you to generate an unlimited number of “what if” scenarios. This will include the ability to view report output for each scenario and to select one version as final.

Update to Excel Uploads

The Import New Business Budget from Excel and Import Budget/EAC from Excel applications will be updated to be comply with Web service requirements and to improve overall usability. For example, actions which are presently executed from a screen button, such as uploading and validating data, will instead be executed from a menu option.

New Mass Create/Commit Utility

Organization Budgeting will include a new application (Mass Create/Recommit Budgets/Outlooks) that will provide the ability to create and commit Org budgets and outlooks en masse (as a group). From this screen, you will be able to run a query according to fiscal year, organization, and type (budget or outlook), and based on results, you will be able to:

- Mass create outlooks for budget types that have a status of Approved.
- Mass commit or recommit budget types that have a status of Complete, Incomplete, or Working.

Resource Planning Task Reassignment and Rescheduling

The Budget By Resource application will be enhanced to enable you to:

- Reschedule the start and end dates of an assignment for a selected resource.
- Reassign budgeted hours from one resource to another resource for an entire period or specific date range.

Other Updates to New Business Budgeting

Employee Schedule Subtask

New Business Budgeting will be updated to include the Employee Schedule subtask, which Project Budget Analysts can use to view all the projects to which an employee is currently budgeted, including total scheduled hours and total remaining hours.

Multi-New Business Budget Consolidation (Rev/Cost)

Multi-Proposal Consolidation (Rev/Cost) (NPT3) will be renamed to Multi-New Business Budget Consolidation (Rev/Cost), and it will also be updated with additional functionality.

This new application will be used to specify individual new business budgets to be reported as part of a consolidation project revenue and/or cost report. The report runs a consolidated single report based on the new business budgets that you selected.

Structured New Business Summary (Rev/Cost)

Structured Proposal Summary (Rev/Cost) NPT4 will be renamed to Structured New Business Summary (Rev/Cost), and it will also be updated with additional functionality.

This new application will be used to run a report that displays cost or revenue amounts on individual New Business Budgets within a selected period of performance. All completed budgets regardless of work type, whether Proposal, Work Type, or Add On, will be displayed. Hours and Amounts in the New Business Budgets will be displayed in the Structured New Business Budget Summary as amounts.

Project Budgeting Usability Improvements

The following improvements will be made to improve usability in Project Budgeting:

- **Add % Complete Revenue Formula:** Several revenue formulas based on the % complete will be added.
- **Hide Redundant Data Rows:** The ability to hide rows is being added to Project Budgeting/EACs.
- **Hide or Delete Historical EACs:** Options for managing the number of EACs will be added, including the following:
 - Only show budget level projects/EACs.
 - Hide budgets/EACs by individual budget.
- **Allow Rates in Project Budgets:** If Labor Suppression is turned off in the Costpoint Security Settings, you will now be able to include employee labor rates in queries and see the rate in the Hr Rate column of Staff Hours in Project Budgeting, New Business Budgeting, and Budget by Resource.

Delete Historical EACs

A new Delete Historical Projects/EACs application will be added that will enable you to delete EACs by version or date.

People/Regulatory

Support for Life and Supplemental Life Guaranteed Issue and Evidence of Insurability (EOI)

Life, AD&D, Disability, and Supplemental insurance plans often cover individuals only up to a specific amount (Guaranteed Issue) unless the covered individual provides Evidence of Insurability (EOI). An EOI is normally a health questionnaire that the insurance company uses to verify if a person meets the definition of good health.

The purpose of this enhancement is to allow you to identify benefit plans which require EOI and track the EOI status of employees that elect those benefit plans. Costpoint will allow you to indicate the conditions which will necessitate evidence of insurability and the rules for handling the benefit plan coverage if the employee or dependent is denied coverage or has a pending EOI.

Update for VETS Options on the Manage Employee Information Screen

This enhancement features the following:

- The Manage Employee Information application will provide the following new U.S. veteran options:
 - Recently Separated Veteran
 - Not a Protected Veteran
 - Declined to provide veteran status
- The Print VETS-4212 Report application will be updated to report Recently Discharged Veterans based on the new check box on the Manage Employee Information screen. The report will also retain the ability to include employees if their discharge/release date is within 36 months (3 Years) prior to the specified period end date.
- Costpoint Employee Self Service (ESS) users will be able to view their U.S. veteran status in the Employee Personal Info (ESQEMPLPERINFO) application.
- Costpoint will provide HR Administrators the ability to view the changes to an employee's U.S. veteran statuses in the Employee audit table.

Total Compensation Control Field on the Team Management Settings

The Team Management Settings screen will provide the ability to control if the Benefit Elections subtask should be displayed on the Total Compensation screen. Currently, the display of the Benefit Elections subtask depends on the setting on the Configure Self Service Settings screen in ESS.

New Supervisor Field in Costpoint

The Manage Employee Salary Information screen will provide an additional **Supervisor** field which can be tracked by date. The **Supervisor** field will also be added to Team Management applications.

For Costpoint users that integrate with Deltek Talent Management, this field is also now available in the Transfer Talent Management Data screen and users can choose to send either the Supervisor or Manager to/from Deltek Talent Management.

Allow Non-Payroll Clients to Track Changes on the Manage Employee Salary Information Screen and Manage Employee Information Screen

The View Employee Information and View Salary Information and History screens will be transferred to the Employee menu. The applications will be part of the Costpoint core applications and will no longer be based on a Payroll license.

The Enable Audit File Tracking check boxes for Basic Employee Information and Employee Salary Information will also be transferred from the Configure Payroll Settings screen to the Configure Labor Settings screen.

Add Minimum Election to Flexible Spending Account Setup

This enhancement will add a field to the Medical FSA, Dependent FSA, and Medical HSA Plan Year settings screens which will allow employees to specify a minimum election amount for the plan year.

Create Cache Tables and Create CSV Export Files When Exporting Data from Costpoint to Time and Expense

A new check box will allow users with both Time and Expense version 9 and version 10 installations (or disconnected version 10 installations) to create export CSV files. It will also insert Link records being exported to the permanent work tables. The check box will apply to the four link tables: Link12, Link19, Link29, and Link27.

Materials

Supplier Portal-Shipping Notifications

The Supplier Portal Shipping Notifications feature will enable the supplier to enter shipment information for specific purchase order (PO) lines and let the buyer know that a shipment has been made against the PO. The buyer will be able to receive email notifications when items are shipped from a supplier. In addition, this feature will provide both the buyer and the supplier the visibility on PO items that have been shipped.

Expanding Notes Fields

This enhancement will allow you to add/view more information in the **PO Line Expediting Notes** and **Internal Notes** fields (for purchase orders) as well as the **Requisition Internal Notes** field (for purchase requisitions) in Costpoint. It will enable you to input/display more characters and help eliminate the need of sending another email just to add the information that you were unable to add to the PR/PO due to input field constraints.

For MSS database users, the data type can now accommodate up to four (4) GB of character data. For Oracle database users, the data type can accommodate approximately up to two (2) billion characters.

Autoload Standard Text Options for Lines

This enhancement will allow you to choose a setting that will automatically add specific item standard text to the line level of a purchase order, purchase requisition, sales order, bills of materials, or manufacturing order that you have chosen in the Where-Used subtask if the item is included in the purchase order, purchase requisition, or other transactions associated with any one of the previously mentioned documents. Any additional item text or project item text that may have been added after the initial autoload can be loaded by using the **Autoload** button.

Initiate PO and PR from Manage Subcontracts

This enhancement will allow you to initiate a purchase order/purchase requisition (PO/PR) from the Manage Subcontracts screen and have data default in based on your Subcontract ID.

You can do this by using the new Subcontract Information tab to link the PO/PR to a subcontract record using the **Subcontract ID** field on this tab. Costpoint then updates the subcontract record on the Manage Subcontracts screen with the PO/PR details from the PO/PR screens.

Note: For more information about this enhancement, see [Initiate Purchase Orders and Purchase Requisitions from Manage Subcontracts](#).

View Part Inventory

This enhancement will allow you to access the full requirements, from the View Part Inventory screens of the Inventory, Production Control, Material Requirements Planning, and Master Production Scheduling modules. The new Full Reqmts subtask to be added to the screens will let you view all requirements identified by the Materials Requirement Planning (MRP) process.

In addition, **Order Reference** fields have been added to the Requirements subtask to enable you to view the same information from the **Order Reference** field of the MO subtask.

Create Journal Entries from Standard Costing Updates

This enhancement will allow you to create cost adjustment transactions, see the impact of the cost adjustments made to standard costing, and post them to the general ledger (GL).

Costpoint Business Intelligence for Manufacturing & Procurement

This Costpoint Business Intelligence (CBI) enhancement implements the Materials Organizational and Part security within the data models. This will allow you to suppress organization-specific data based on the Organization Security setup in Costpoint as well as disallow visibility into reports or data that contain unauthorized parts based on Part Security setup in Product Definition. This enhancement will also include two standard dashboards with insights into procurement and manufacturing data to help you make business decisions.

Note: For more information about this enhancement, see [Costpoint Business Intelligence 8.0](#).

Supplier Portal-Invoice Management

This feature will provide you with a simplified invoice delivery and reconciliation process between the payer and supplier. In Subcontractor Management, you will be able to submit invoices to your their subcontractors, who will then be able to communicate on, view, and approve the invoices generated by the payer in Costpoint. The subcontractors and suppliers will also be able to create and submit invoices for parts, goods, or services utilizing purchase order (PO) data from Costpoint, including Time & Expense information where applicable.

Supplier Portal-Digital Signature for Invoices

This feature will allow you to utilize digital signature technologies to make your Supplier Portal invoice transactions legally binding even without the physical signed copies of the invoices. On the Manage Invoices screen, if you and the vendor are set up for a digital signature, the **Approved** check box in the **Supplier Approval** group box will be disabled and there will be a sign option in the toolbar. Both parties will approve the invoice by signing the document with a FIDO (Fast ID Online) device, which will save the approved information and user-specific keys in a separate table. This technology provides a high level of assurance and accuracy for both parties during the agreement process.

Exclusion List Warning

This feature will alert you if a vendor is on the government exclusion list when creating a purchase order, request for quote, quote, or return for that vendor.

GovWin IQ captures vendor information such as government exclusion list data from SAM.gov, and this information is updated weekly in Costpoint.

During the creation of the purchase order, request for quote, quote, or return, a warning will be displayed if the selected vendor is on the exclusion list. You can then decide whether or not to continue with that vendor for that transaction.

Note: For more information about this enhancement, see the [GovWin IQ to Vendor Integration](#) feature.

Option to Default Estimate to Complete Percent

This enhancement will provide you with the option to use a default **Estimate to Complete Percent** value other than zero when creating manufacturing order (MO) partial reliefs. When you set a default **Estimate to Complete Percent**, Costpoint will use that value as a default in the MO relief. This value can be edited on the Enter Manufacturing Order Reliefs screen.

Add Revenue Recognition Field to the SO Approval Process

This enhancement will allow you to see the Revenue Recognition Method in the sales order (SO) details of the Approve Sales Orders screen without having to navigate to other screens at the time of approval.

Add New Input File Fields to PO Preprocessor

This enhancement will allow you to import the purchase order (PO) header order date, PO line manufacturer ID, and the PO line NSN (National Stock Number) on the Import Purchase Orders screen.

Reconcile Inventory Serial Lot Qty to Location Detail Qty

This enhancement will allow you to reconcile inventory serial/lot quantity to location detail quantity on the Reconcile Inventory Balances screen when the inventory table is out of sync with the serial/lot table.

Time & Expense

This section describes version 8.0 enhancements for Costpoint Time and Expense.

Improved Integration with Costpoint

Integration between Time & Expense and Costpoint will be improved so that when the products are co-deployed, you will not need to download the following links:

- Link 27 (Project\PLC and MO\Routing)
- Link 29 (Project\Org)
- Link 12 (Project/Account)
- Link 19 (Account/Org)

Master Card Credit Card File Import

The Expense module will include the ability to import batch credit card information from MasterCard. The MasterCard import will validate that the file has tokenized account numbers for security, and will only import the file if it contains tokenized account numbers. Customers can request the tokenized CDF3 file from their credit card issuer.

Approval Role Improvements

The Manage/Approve Expense Reports and Manage/Approve Expense Authorization applications will be enhanced to make the process of approving reports and authorizations more intuitive.

Download Image Receipts from the Alternate File Location

Based on access rights, users will have the ability to download expense receipts from the Alternate File Location.

Improvements to Menu and Applications Names

Menu and application names throughout Time & Expense will be improved.

Copy Merchant Info from Outstanding Expenses to Claimed Expenses

The merchant information from the credit card feed and mobile application captured expenses will now be saved so that it can be printed in the expense details and stored for later reference.

Expense Proxy User Improvements

The user experience is being improved for individuals who have designated rights for creating expense reports or authorizations on behalf of others (referred to as “proxy users”). This will include the following:

- Proxy expense entry will be the same as individual expense entry, including expense wizard, except for the ability to choose the user for whom the report or authorization is being created.

- Proxy users will have access to all the necessary outstanding expenses, including credit card expenses.
- Proxy users will see the expense reports for each user they have the ability to be a proxy for.
- The Manage Expense Report and Manage Expense Authorization screens will open in Table View.

Improvements to Expense Type Setup for Per Diem Meal Ceilings

You will be allowed to claim individual expenses for per diem ceiling meals.

Pop-Up from a Screen Button

Pop-up windows in the Expense module will no longer display with a red border.

Leave Request Enhancements

The process for requesting leave on the Manage Work Schedule screen will be improved as follows:

- The Leave subtask will be changed to Request Leave.
- You will be able to choose a leave type (for example, Holiday or Vacation).
- Leave balances for each available type will be shown on the screen.
- You can enter the number of days being requested.
- You can add notes/reason for the requested leave.

Additional updates to Manage Work Schedule include:

- Screen instructions will be updated.
- Verification that the balance is depleted both when a leave request is submitted for approval and when the leave is taken on a timesheet without a leave request.
- Leave type being requested will be included in the workflow email sent to approvers.
- Buttons will be color coded according to action.

To enable those with an approval role to more quickly approve leave requests, the Manage Resource Leave screen will be updated as follows:

- Pending leave requests will be converted to hyperlinks that open the request in a pop-up dialog box.
- **Approve** and **Reject** buttons will be added to the middle of the screen.

Mobile Browser Time (PWA) Updates

Costpoint provides you with a new user experience when you access Costpoint Time via a web browser on your mobile device. This was released in November 2019 as an opt-in option. The new experience is the default after you update to Costpoint 8.0. You have the option to turn off the new user experience on the Miscellaneous tab under General Settings, if you prefer the old experience.

8:16
94%

Timesheet

Lark, Heath 7777 Open 05/15/2020

Timesheet Lines

Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri
01	02	03	04	05	06	07	08

Total Hours: 5.00

20220.30.01

1 COTS Systems

50-100-10 / AK / ITGENL / BRV

5.00

Sign
Add Line to Favorites

Line Approval Information

Mobile Expense-Related Updates

Several updates will be made that are related to the new native mobile version of Expense Reports, including the following:

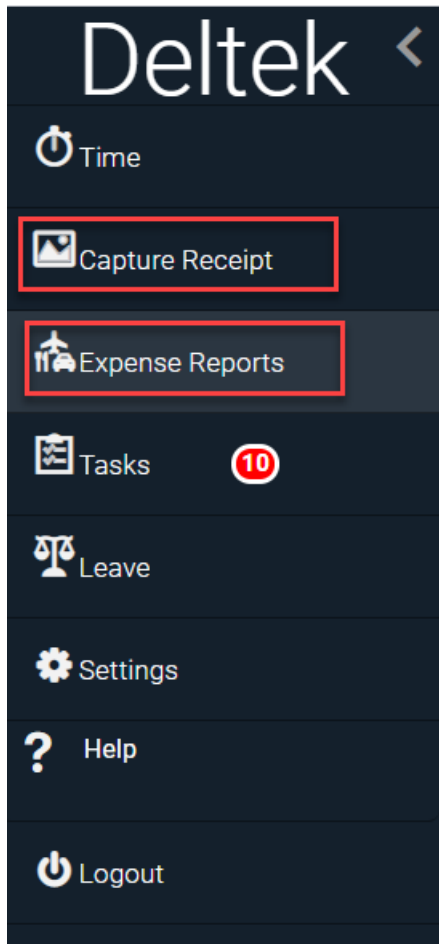
- The Expense module will include the ability to make multiple receipt attachments per claimed expense line and expense report.
- You will have the ability to view all expense images not yet attached to a report at any point within the entry process.
- In Default Charges, the **New** button will be renamed to **Add Charge**.
- Configuration settings will be added that support automatic attachment of captured images to expense lines.

Note: The following topics include additional enhancements to be made to the Costpoint Mobile Time and Expense application.

The official name of the application is Costpoint Mobile Time and Expense. This document only uses it at first mention. The succeeding instances of the application name display Costpoint Mobile T&E.

Mobile Expense Feature

The Expense feature will be added to Costpoint Mobile T&E, which will allow you to add and capture out-of-pocket expenses as you incur them, without accessing Costpoint Time & Expense. Two new screens, Capture Receipt and Expense Reports, will be added to the user interface to support this feature.



Using Costpoint Mobile T&E, you will be able to manage expense reports and outstanding expenses by performing several tasks.

For expense reports, you can:

- Add expense reports.
- Edit expense reports with saved, submitted, or signed status.
- View summarized existing expense reports along with the ability to drill into expense report details.
- Submit and sign expense reports for approval and processing.
- Approve expense reports, charge allocations, and attachments.
- Void expense reports.

For outstanding expenses, you can:

- View outstanding expenses that have not yet been claimed on expense reports.
- Edit an out-of-pocket expense you previously entered or provide additional details for a credit card sourced transaction.
- Delete a previously captured out-of-pocket transaction or credit card transaction, if the related setting is enabled in Costpoint Time & Expense.

With the addition of the Expense feature, the following tasks will be available on the Tasks screen:

- Sign expense report
- Approve expense report
- Approve attachment (overall and expense level)
- Approve charge (charge allocation)
- Record attachment (expense level)

Capture Receipts with Intelligent Character Recognition (ICR)

Using your mobile device, Costpoint Mobile T&E will enable you to capture and upload expense information and receipts to the Costpoint Time & Expense database. You can capture and upload a single image or combine multiple images into a single image using the Stitch functionality.

Costpoint Mobile T&E will be integrated with Verifyi, an optical/intelligent character recognition software to capture text from images (for example, receipts). When your device captures a receipt, Costpoint Mobile T&E gathers all detailed data available in the image and intelligently maps the collected data to the relevant fields of the expense entry.

Configure Usage Tracking through Google Analytics

Costpoint Mobile T&E will provide an option to configure usage tracking through Google Analytics. Users can turn on or turn off usage tracking through the **Allow users to send information to Google Analytics** setting to be added to Costpoint Mobile T&E.

If this setting is selected, Costpoint Mobile T&E follows its current behavior:

- The Usage Statistics Tracking screen is available and displays during login.
- The **Usage Tracking** field is available on the Settings screen.

If this setting is cleared, Costpoint Mobile T&E follows the following behavior:

- The **Usage Tracking** field on the Settings screen is hidden on the Settings screen.

Help System in HTML Format

The Costpoint Mobile T&E User Guide, previously in PDF format, will be delivered in HTML format.



Back Arrow Button on the PIN Screen

The **Back Arrow** button will be added to the PIN screen to allow you navigate back to the previous screen without closing the application in case you decide not to change your PIN.

Reports & Analytics

Role-Based Dashboards Enhancements

Several upgrades are being made to the dashboards to improve usability. These include, but are not limited to, the following:

- On all dashboards, the Parameters tab will be removed, leaving just the graphical/tabular presentation of the dashparts. The functionality of this tab will be replaced by the following:
 - **Manage Dashparts link:** Clicking this new link on the upper-right corner of the dashboard opens a dialog box where you can specify which dashparts to display on the dashboard and in what order they should display. You will also be able to edit the settings used for each dashpart here.
 - **Edit icon** (): This will be added to every dashpart so that you can modify the settings used on a particular dashpart. Note, however, that if there are no dashpart settings, the **Edit** icon will still display but will be disabled (grayed out).
- A **Help** icon () will be available on each dashpart. When you click this icon, Costpoint will display a pop-up window that will give you more information about the data on the dashpart and on the drill-through application that you can access from the dashpart.
- The drill-through links on the My Tasks dashpart on the Home Dashboard are being updated to let you directly launch the screen where a specific task should be completed. Previously, links on this dashpart were directed only to the Manage MyDesktop screen. Manage MyDesktop will no longer be available in Costpoint 8.0.
- The new My Workflow Approvals dashpart will be available on the Home Dashboard. This is a table containing a list of the approval tasks assigned to you. Only those steps that you have not yet completed are displayed on this dashpart. Information that displays on the dashpart include the approval workflow name assigned to the screen where you need to accomplish the approval step, the step name, the time elapsed and remaining, and the status of the approval task. Clicking the workflow name link will get you to the screen where the approval step should be accomplished.

Costpoint Business Intelligence 8.0

Costpoint Enterprise Reporting (CER) will soon be called Costpoint Business Intelligence or Costpoint BI. It will have a different name but will still utilize project data with speed, agility, and accuracy.

Costpoint BI 8.0 will leverage Cognos Analytics 11.1.5 and will be released alongside Costpoint 8.0.

Procurement Content

A new data model will be available for Procurement. This new model will support Organizational and Part security for standard and ad hoc reports as well as the new Procurement dashboard. These security enhancements will suppress org specific data from users based on their Org security settings as well as not allowing visibility into reports or data that contain unauthorized parts based on part security setup. The following reports will be included in the Procurement folder on the Costpoint Business Intelligence screen:

- Buyer Requisition Worksheet
- PO Commitments Detail
- Purchase Order

- Requisitions
- Requisitions Pending
- PO Header and Line Detail – Drill Thru from PO Commitments Detail
- Requisition Detail – Drill Thru from Requisitions Pending

The Procurement dashboard displays analytics for both purchasing and procurement planning with requisitions, helping you make better business decisions with data such as:

- **Total value spent on procurement:** Understanding overall procurement spend, lets you see where you stand for the year and if you are above or below budget and if you need to start making adjustments.
- **Number of active vendors:** Having diversity and variety in vendor selection is key to a healthy supply chain. This KPI adjusts as you interact with other areas on the dashboard to always have visibility into your vendor count for multiple different procurement scenarios.
- **Spend by commodity:** Understand your spend on different commodities and see which vendors you are utilizing the most with the ability to drill thru to a see each commodity spend by vendor
- **Purchase Orders (PO) by status:** See which suppliers are not fulfilling their orders on time, with a count of POs in each status and drill thru chart to narrow down by vendor to see their individual statistics.
- **Requisitions awaiting approval by approver:** Know where your approval process is being held up with this view into requisitions that are in-approval by the current approver. The drill thru detail report shows how long the requisition has been awaiting approval in that phase of the process so you know where to take action to move those requisitions through the pipeline.
- **Requisition status by requisitioner:** Have better visibility into the performance of your requisitioners by seeing a count of their requisitions in each status.
- **Approved requisitions awaiting PO conversion:** Understand Buyer performance with visibility into the number of requisitions that have been approved but are awaiting conversion to a PO. The drill thru detail report shows the date the requisition was approved, the number of days since approval, the target date that a PO should be created and the number of days until or past the target place date.

Manufacturing Content

A new data model will be available for Manufacturing. This new model will support Organizational and Part security for standard and ad hoc reports as well as the new Manufacturing dashboard. These security enhancements will suppress org specific data from users based on their Org security settings as well as not allowing visibility into reports or data that contain unauthorized parts based on part security setup. The following reports will be included in the Manufacturing folder on the Costpoint Business Intelligence screen:

- Indented Bill of Materials (BOM) Report
- MO Build-To Inv Abbrev
- MO Component Shortage Report
- MO Pick List Report
- MO Production Status Report
- MRP Message Report

- Summarized Bill of Material (BOM) Report

The Manufacturing dashboard displays information such as:

- **Manufacturing Order (MO) production status:** Understand where your in-process MOs are in the production with a count of each status and utilize the drill thru detail report to see a breakdown of each status by planner and build part and see the number of days it has been in that status, the planned due date, need date and MO completion %.
- **MO cycle time:** See the average number of days it takes a manufacturing order to be completed with this summary value that shows an overall average of MO Cycle Time. This KPI adjusts as you interact with other areas on the dashboard, including filters by part, planner, and project.
- **MO planned date vs. actual date:** Get insight into planner performance by comparing planned dates vs actual dates for both release and in-shop for each MO. The drill-through reports show you MO details grouped by planner to reveal the build part and the difference in days from planned to actual.
- **ECN Status:** Be proactive with a view into the number of ECNs in each open status. Utilizing the detailed drill-through report allows you to see Manufacturing Orders that may be impacted by an ECN for any build part or component parts on the MO. This report guides you to see when the change is planned to be implemented and how that could affect your MO status and due date.

Materials Content

A new data model will be available for Materials which will support Organizational and Part security for standard and ad hoc reports for Sales Orders, Product Definition, and Inventory. These security enhancements will suppress org specific data from users based on their Org security settings as well as not allowing visibility into reports or data that contain unauthorized parts based on part security setup. The following reports will be included in the Materials folder on the Costpoint Business Intelligence screen:

- Audit Log Report
- Stock Status Report
- Parts List
- Goods List
- Services List
- Item Vendors
- Sales Order Status Report
- Shipped Revenue Report

Time Content

A new secure Time model will be available. There will be two new reports which are:

- Charge Activity
- Resource Activity

New user groups for Costpoint Business Intelligence will be created for this new Time model, specifically CER Time Secure (CER__TE_SECURE).

Artificial Intelligence (AI)-Assisted Business Intelligence

Costpoint BI will take advantage of the new Artificial Intelligence features in Cognos Analytics v11.1.5, making it easier for all types of users to create reports and dashboards. The AI will also automatically provide key insights hidden in your data. Some of the key features of AI-assisted BI are:

- **Recommended and Related Visualizations:** Based on the data selected, the AI capabilities will recommend visualization that best suit the data.
- **AI Assistant:** This is an embedded assistant that supports text-based input to help you gain quick insights into your data and simplify your analytics. By simply typing questions into the assistant, you can access key data sources, create visualizations, and drag them onto your Exploration or Dashboard canvas.
- **Explorations:** Explorations are where you can discover and analyze your data. You can also explore an existing visualization from a dashboard or story. Uncover hidden relationships and identify patterns that turn your data into insights. Correlated insights are represented by a green icon with a number on the x-axis, y-axis, or the title of a chart.
 - **Relationship Diagrams:** The central visualization in an exploration shows all the fields in your data and the strength of the relationship between them. The thickness of the line indicates the strength of the relationship.
 - **Driver Analysis:** Specific visualizations understand which data fields have an impact on other fields, in other words, the degree that one data element drives another field.
 - **Comparison Cards:** Quickly take your exploration charts into an analytical comparison mode to quickly compare different time periods, organizations, and others.
 - **Insights:** Automatically generate statistical insights into the data in chart.
 - **Natural Language Generation:** The system automatically creates written analysis about the data in a visualization, pointing out anomalies in the data that may not be obvious to the user.
- **Predictive Analytics:** Automatically create forecasts based on historical time-phased data like hours, costs, or revenues

Use your own data from the Costpoint data models and uploaded MS Excel files to utilize the new AI functionality. The flexibility of this new feature will provide you with more options in analyzing data for your unique business needs.

Leveraging these new AI capabilities, Costpoint BI is releasing our first Smart AI package, which is focused on Resource Management. Applying AI to the resource management process in Costpoint Planning will help:

- Understand future resource needs including generic staff and vendors
- Analyze historical utilization vs. budgets and EAC's
- Optimize future utilization
- Incorporate future plans for New Business projects into decision making

Included in the Smart AI package are:

- A data module and data set for fast performance to create dashboards and explorations
- A pre-built dashboard that will show the capabilities for the Smart AI subject area
- Sample questions for the AI assistant that will automatically create visualization with your data

Accounts Payable Content

The Accounts Payable model, which you can use as basis for creating reports and dashboards that show accounts payable content, will be available in Costpoint BI 8.0.

Accounts Payable Aging Report

The new Accounts Payable Aging Report will use data from the new secure Accounts Payable model.

Unlike the reports in the legacy version, certain improvements will be included in this report version:

- Tabs on the prompt page will be removed so you can enable the interactive viewer feature for this report.
- The description of the report will be in the Properties section.
- For easier navigation, the main report page will display first, and tabs will be available on the pages of the report.
- There will be a revision history that has a log of all changes made in the report.

New Contracts Reports

The following new reports will be added to the Contracts module:

- **Opportunity Revenue Forecast** – This report displays the value of a contract spread out from the start and end dates of the opportunities.
- **Contract Brief Report** – A contract brief is a summary of key information of a contract. As a government contractor, it helps you to fully understand the terms and conditions of the contract.
- **Contract FAR/Supplemental Report** – This report displays the FAR and Supplemental clauses and provisions related to specific contract or subcontract records. This report is useful when you want to see what contract/subcontract records are related to a specific FAR or Supplemental record. This report can also be used to identify contracts that have high risk clauses/provisions associated with them.

Project Planning Models

Some legacy reports have been improved and relocated to the secured Projects area. User-defined fields will also be added to the Project Planning model.

New Security Groups

New security groups will be added to support the new secure models in Costpoint BI in the areas of Materials, Procurement, Manufacturing, and Time.

Costpoint Authentication Provider 8.0

The Costpoint Authentication Provider 8.0 or CAP will be modified to support the new security groups that will be used for the new areas and models in Costpoint BI.

Admin

Costpoint Login Banner

To meet the requirements of some organizations, administrators will be able to configure a message that users will have to respond to in order to log in to Costpoint,

Navigation Banners

To help eliminate the need to remember complex processes and to make it easier to navigate a workflow, Costpoint will provide you the option to use a navigation fly-out banner as a guide. The navigation banner, which displays at the top of an application screen, is made of application links displayed in the order of a process flow. It enables you to open applications within a process without using Browse Applications or returning to My Menu.

For example, you can make a banner to reflect the steps in the AP Voucher process with the following applications:

- Manage Accounts Payable Vouchers
- Print Accounts Payable Voucher Status Report
- Approve Vouchers
- Post Vouchers
- Print Open Accounts Payable Report

Configure User Preferences for Navigation Banner

In Configure User Preferences (UPMUSRPR), you can select the new **Create Nav Banner?** check box to enable a navigation banner to display for a group heading in My Menu. When you select the group header in My Menu, the application grouping will display in a banner across the top of your Costpoint screen.

You must have security access to applications to see the application names and links in My Menu and the navigation banner.

User Security for Navigation Banners

Limit the ability for users to create navigation banners using the new **Allow to Enter Navigation** column in the Manage Users (SYMUSR) application. In the My Menu window in Configure User Preferences, select the **Create Nav Banner?** check box to give a user the access to select group headers for the navigation banners.

Create Company-wide Navigation Banners

Companies can set up navigation banners and assign them to user profiles in the Manage User Interface Profiles (SYMPROF) application. You will be able to select the check box in the new **Create Nav Banner?** column for a My Menu group in the My Menu subtask to create a navigation banner for the group. Users with the UI profile will have the allotted security access to use the banner.

If a user has the access rights to create navigation banners, their banners will overwrite what was assigned in their UI profile.

Preprocessor to Populate Active Directory or Certificate ID Field

A Costpoint Admin will have the ability to run a preprocessor to update the **Active Directory or Certificate ID** field on the Manage Users (SYMUSR) screen. The Admin will need to create an import file that includes the users' Costpoint ID and Active Directory ID. This enhancement reduces the time it would take to update the Active Directory ID for a large number of employees.

Support for Dynamic Columns

The Costpoint Web service will be updated to support the population of dynamic columns in the Project Budgeting, New Business Budgeting, and Resource Planning applications in the Planning module.

Display New UI Interface Only

The Classic View and New UI toggle will be removed from the Costpoint login page. All of Costpoint will display in the new user interface.

Content Management Integration (CMI) Updates

Enhancements will include Costpoint CMI compatibility with Office 365 GCC and SharePoint 2019.

New Default Email for Costpoint Cloud Email Notifications

All email notifications initiated from Costpoint will have a default sender email address of Noreply@Deltak.com.

Business Intelligence and Reporting Tools (BIRT) Upgrade

Costpoint will be updated to include the latest version of BIRT.

Platform Changes

Updated WebLogic Support

Costpoint will be updated to support WebLogic 12.2.1.4.

Web Browser Support

The latest versions of Google Chrome, Microsoft Edge, Apple Safari, and Firefox will be compatible with Costpoint 8.0. Microsoft Internet Explorer 11 will not be officially supported as Microsoft is no longer enhancing IE as it approaches end-of-life in place of Edge.

Installation Instructions

There are no new installation instruction changes currently planned for Costpoint 8.0.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com