Deltek

Deltek Costpoint Hot Fix Readme

Release Date: October 25, 2018

Home Dashboard

The Home Dashboard displays actionable data that you access most often, including information on your timesheets, pending tasks, expense reports and authorizations, available leave balances, and outstanding expenses. It gives you summary information on these data and at the same time provides links to screens where you can view additional details.

The following are required before you can access Home Dashboard:

- Deltek Time & Expense license
- Access to the Dashboards module
- Access to the Home Dashboard application

The dashparts on this dashboard source data from Time & Expense and also provide hyperlinks to drill-though applications in Time & Expense. In addition to the requirements stated above, you must also have access to the drill-though application before you can open the drill-through screen.

> **Note:** If you are not licensed for Time & Expense and you do not have the appropriate module/application rights, Costpoint displays an error message when you try to access Home Dashboard and its drill-through applications.
>
> Contact your system administrators for access concerns. System administrators can assign users and user groups **Read-Only**, **Full**, or **Deny** rights to the Dashboards module, the Home Dashboard application, and any other applications using the Manage Users and Manage User Groups screens.

This dashboard is linked to a Home icon so that it is easily accessible as soon as you log in to Costpoint. This icon is located on the top-left side of the screen and is visible only to users who are licensed for Time & Expense. The dashboard is also accessible from the Reports & Analytics domain (**Reports & Analytics » Dashboards » Dashboards » Home Dashboard**).

The following dashparts are available on the Home Dashboard:

- **My Tasks** — This is a table that lists your pending tasks related to timesheets, expense reports, and expense authorizations. Tasks are sorted by priority level, with those on high priority displaying on top. You can click a link in the **Pending Tasks** column to open the Manage MyDesktop screen and view more information related to the task selected.
- **My Timesheets** — This is a table that displays a summary of your 10 most recent timesheets. It includes information on the timesheet period end date and description, as well as the total hours for each timesheet period. When you click a link in the **T/S Period End Date** column, Costpoint opens the Manage Timesheets screen that you can use to view additional details about the timesheet.

- **My Leave Balances** — This is a numerical table that lists your leave accruals and leave balances per leave type. Lines are sorted by leave type. The hyperlinks in the **Leave Type** column bring you to the Manage Timesheets screen. On this screen, you have to open the Leave subtask so you can view additional leave information.
- **My Expense Reports** — This is a numerical table listing your 10 most recent expense reports with their current status. The dashpart provides details on the expense report date, expense report description, and the total expense amount. To know more information about an expense report, you can click a link in the **Description** column to open the Manage Expense Report screen.
- **My Expense Authorizations** — This is a numerical table that includes your 10 most recent expenses that have been authorized. You can view the date on which the expense authorization was created, the expense authorization description, and the total expense amount that has been authorized per expense authorization line. Clicking a link in the **Description** column launches the Manage Expense Authorization screen, where you can access more details about the expense authorization.
- **My Outstanding Expenses** — This is a numerical table that lists your outstanding expenses. It gives you information on the batch type of the expense, the expense date, and the expense amount that you need to claim. The currency of the expense is also indicated. Lines on the dashpart are sorted based on the expense date, with the latest displaying on top. Note that this dashpart does not have hyperlinks to a drill-through application.

Aside from drilling down from the dashpart to a screen in Time & Expense, you can perform the following actions on the dashboard:

- Set up which dashparts to display and in what order.
- Sort columns in a table.

Attention: Refer to the online help for more information on the Home Dashboard and the basic procedures that you can perform on this dashboard.

You can also refer to *Costpoint 7.1.1 Home Dashboard Overview* video for an overview demonstration of the Home Dashboard, which is available in the following link: https://help.deltek.com/Product/Costpoint/USS/HomeDashboard.

System Requirements

This enhancement requires the following:

- Costpoint 7.1.1 System JAR 046 (cp711_sys_046.zip)

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
Reports & Analytics	Dashboards	DBDHM	Home Dashboard	cp711_dbdhm_001.zip

Known Issues

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 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.

Mobile: No Toggle Buttons for the Parameters and Reports Tabs

In smartphone view, when you go to the Parameters tab, the toggle buttons for the Parameters and Reports tabs do not display, making you unable to go back to the Reports tab. You will need to close the dashboard and reopen it to view the Reports tab.

In web view, when the navigation path area gets too long for the screen, the toggle buttons for the Parameters and Reports tabs are cut short, also making it difficult for users to access the Reports tab.

Mobile: Header Issues on Tables

In iOS, users can keep scrolling down even without the actual scroll bar. When users scroll up, issues occur on the header of dashparts presented as tables.

Viewing the Online Help

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

More information about this release is on the following page.

Custom Programs Affected

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Support Center at https://deltek.custhelp.com before you install the update.

To Download the Hot Fix/Feature Update

1. From Internet Explorer, go to https://dsm.deltek.com.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Support Center credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

To Install the Hot Fix/Feature Update

Refer to the installation instructions posted on Deltek's Support Center site, https://deltek.custhelp.com.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.
- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.
- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

To Check to See if the Hot Fix is Installed

1. Open the application that was updated.
2. Click **Help » About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

To Check to See if the Feature is Installed

1. Click **Help » About Costpoint** from the Costpoint toolbar.
2. Open the Features subtask and click the Feature that was just installed.
3. Open the Applications subtask. Check the list of applications and their corresponding application jars and see if they are correct and have been successfully deployed (highlighted in green).
4. Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

> **Note:** Most of the features installed have their corresponding patches, but not all.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

> **Attention:** For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

> **Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

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