Deltek

Deltek Costpoint Hot Fix Readme

Release Date: October 31, 2018

Allowing Contract Parent/Child Records in Opportunities and Contracts

Costpoint users may have Indefinite Delivery/Indefinite Quantity (IDIQ) and Blanket Purchase Agreement (BPA) type contracts that have parent/child relationships. To allow better tracking of these relationships, the Manage Opportunities and Manage Contracts screens have been updated so users can link parent contracts to contracts that are awarded under higher-level types of contracts.

Screen Updates

The following applications have been modified for this enhancement.

Manage Opportunities (CTMOPP)

Two new fields have been added to the **Contract Information** group box of the General tab of this screen:

- **Prime Contract No** — Enter the prime contract number of the contract to be linked to the opportunity. This is the number on the signed contract with the customer.
- **Name** — Enter the description of the prime contract number.

The **Prime Contract No** will represent as the parent contract, and the **Task Order No** (also found in the **Contract Information** group box) will represent as the child. The values you entered in **Prime Contract No**, **Name**, and **Task Order No** will flow to the contract on the Manage Contracts screen when the contract record is linked to the opportunity, provided the opportunity is entered in the **Main Opportunity ID** field and the **Costpoint Opportunity** check box is selected in Manage Contracts.

When you run the Project Initialization subtask in Manage Opportunities, the **Prime Contract No** from the opportunity will also populate the **Prime Contract No** in Manage Project User Flow for the projects linked to the opportunity.

Manage Contracts (CTMCNTR)

These are the changes made on the Manage Contracts screen:

- In the **Identification** group box, the **Prime Contract No** and **Name** fields now pull data from the Manage Opportunities screen if the main opportunity ID linked to the contract is a Costpoint opportunity. The default values can still be edited, but the new values entered in Manage Contracts will not overwrite the values in Manage Opportunities.

  The **Prime Contract No** will represent as the parent contract, and the **Task Order No** (on the General tab) will represent as the child.

- When you run the Project Initialization subtask in Manage Contracts, the **Prime Contract No** from the contract will also populate the **Prime Contract No** in Manage Project User Flow for the projects linked to the contract.

- The following changes have been made on the Additional Task Orders subtask on the General tab:

  - You can no longer add or edit task orders on this subtask. This subtask is a now read-only screen that automatically loads the task orders associated with the prime contract number linked to the contract. Note that rows with blank task orders are not displayed on the subtask.

  - The **Load Task Orders** button and the **Master Contract No** field have been removed.

  - The following fields have been added to the subtask:

    - **Contract ID** — This field displays the contract ID.

    - **Contract Status** — This field displays the contract status.

    - **Project** — This field displays the project associated with the task order linked to the contract's prime contract number.

    - **Record Status** — This field displays the task order record status.

> **Warning:** The CNTR_TASK_ORDER table, which was used to store the data entered on the Additional Task Orders subtask, has been removed as the subtask no longer allows entry of new task orders.
>
> Note that when you apply this enhancement, any task orders that exist in the CNTR_TASK_ORDER table will be lost.

System Requirements

This enhancement requires the following:

- PATCH3493
- PATCH3538
- PATCH3545

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
Contracts	Opportunities	CTMOPP	Manage Opportunities	cp711_ctmopp_010.zip
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_010.zip

More information about this release is on the following page.

Custom Programs Affected

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

To Download the Hot Fix/Feature Update

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

To Install the Hot Fix/Feature Update

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

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

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

To Check to See if the Hot Fix is Installed

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

To Check to See if the Feature is Installed

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

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

Appendix: For Additional Information

Deltek Support Center

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

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

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

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

Access Deltek Support Center

To access the Deltek Support Center:

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

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

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