

# Deltek Costpoint Hot Fix Readme

*Release Date: December 27, 2018*

## Workflow Approval Role Filtering

To ensure compliance with company policies, configure role filtering conditions that limit approvals to certain users for a role. Role filtering ensures that the correct approver is notified to review and approve certain records. Role filtering conditions are based on data values of the approval entity and are evaluated when the workflow is running. Build the conditions with fields you define in the new **Role Filter Fields (WFMARF)** application. If multiple condition lines are defined, the AND operation is assumed to connect the statements.

For example, you can set role filtering conditions for Role Name 'Approval' that specifies Role User 1 can approve invoices under \$50k and Role User 2 can approve invoices over \$50k.

The process to use role filtering involves:

- Creating fields for role filtering (Admin » Workflow » Approval Workflow (NEW) » Role Filter Fields).
- Applying role filtering condition statements to role users (Admin » Workflow » Approval Workflow (NEW) » Role Users » Role Filtering Conditions).
- Creating an Entity Field Name and mapping it to the new Matched Role Filter Field (Admin » Workflow » Approval Workflow (NEW) » Approval Entity Fields).
- Assigning the Entity Key Field Name to the appropriate approval screen field ID (Admin » Workflow » Approval Workflow (NEW) » Application Screens » Approval Screen Fields)

## System Requirements

This enhancement requires the following:

- PATCH7165
- PATCH3563
- cp711\_sys\_048.zip
- cp711\_wfmarf\_001.zip
- cp711\_wfmarole\_003.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.

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## 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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## About Deltek

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