




Deltek

Deltek Costpoint® Essentials

Release Notes for Version 8.0

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Welcome to Costpoint 8.0

Welcome to Costpoint 8! This document details all of the enhancements contained in this release, organized by domain.

Helpful Resources

As you work in Costpoint, the following items may prove helpful:

Name	Description	Link
Getting Help for Costpoint Video	Video explaining the best resources for getting help with Costpoint	Getting Help Video
Costpoint Information Center	Stand-alone hub containing all Costpoint documentation for on-premises users	CIC
Costpoint Cloud Information Center	Stand-alone hub containing all Costpoint documentation for cloud users	CIC Cloud
Learning Aids Online Help Topic	Online help topic with links to all Costpoint videos, quick steps, and clickguides	Learning Aids
CP 8 Learning Portal	Deltek University free training site	Training Portal
Online Help	Stand-alone online help system available outside of Costpoint. See more information in the next section.	Help

Transition to a New Format

As part of Deltek's continuing effort to improve the usability of the Costpoint online help, it is being rewritten using the latest DITA-based documentation tools.

Because of the massive amount of work to rewrite the entire online help system, portions of the rewritten help will be released as they are completed. All existing help information is still available during this transition phase to DITA, but the look of some help topics may vary.

Display Issues

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

Accounting

This section describes Costpoint 8.0 enhancements for the Accounting domain.

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

The Dun & Bradstreet (D&B) Data Universal Numbering System (DUNS) that is formerly used as a unique identifier for vendors doing business with the government has been replaced by the General Services Administration's new Unique Entity Identifier (UEI) generated in the System for Award Management.

The following applications have been updated to have a **UEI Number** field. The **DUNS Number** field is retained on these screens for historical purposes and commercial needs only.

- Manage Vendors (APMVEND)
- Manage Contract Management Vendor Info (CTMVEND)
- Manage Subcontracts (CTMSBCNTR)

The UEI Number column has been 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 screens have been updated to enable the suppression of a vendor's Tax ID when a user opens certain screens or prints reports where the Tax ID usually displays.

This update affects the following screens:

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

The **Suppress AP Tax ID** field has been added to Manage Users (SYMUSR) screen in the Admin domain.

You can control SSN and Tax ID suppression by selecting or clearing the **Suppress SSN** and **Suppress AP Tax ID** check boxes on the Manage Users screen. The table below describes how the suppression settings are applied when you open or print reports on the affected screens mentioned above.

Suppress SSN	Suppress AP Tax ID	Result
Cleared	Cleared	The Tax ID displays whether you select non-employee vendors or vendors that are company employees.
Cleared	Selected	The Tax ID displays only when you select vendors that are company employees.
Selected	Cleared	The Tax ID displays only when you select non-employee vendors.
Selected	Selected	The Tax ID is hidden whether you select non-employee vendors or vendors that are company employees.

Add Message to Identify/Prevent Vouchers Being Reversed Multiple Times

The Reverse Posted Vouchers (APPREVVR) screen has been updated to display an error message in the Reverse Posted Vouchers report when you reverse an already reversed voucher. To check if a voucher has been reversed, Costpoint will compare the voucher number on the screen to the stored original voucher number. If the current voucher number does not match the original, then the voucher is already reversed.

The **Reverse Voucher Even if Already Reversed** check box is 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 are 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 Post Vouchers (APPPOSTV) screen has also been updated to store the original voucher number in its history tables.

The **Original Voucher** field is also 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 report for accounts payable or purchase order vouchers on the Print Voucher Edit Report (APRVCHR) screen.

Note: Vouchers reversed prior to this update do not have their original voucher number stored. Original voucher numbers will only be stored for vouchers that you will reverse after this update.

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.

You can now view the **Received Qty** column in the lookup of the **PO Line** field on the following screens:

- Manage Purchase Order Vouchers
- Approve Subcontractor Invoices
- Manage Subcontractor Invoices

Contracts

This section describes Costpoint 8.0 enhancements for the Contracts domain.

Contact and Lead Tracking

You can now track new contacts and leads in Costpoint with key information on status, qualification, source, and rating. A new application lets you enter or search for contacts, run queries on lead/contact statuses, and track lead/contact activities. You can view opportunities and contracts associated with the leads/contacts, and also link a lead/contact to various related leads/contacts.

Several new screens are also created so you can manage lead/contact source types, rating types, and relationship types. Other existing applications in the Contracts and Accounting domains are updated as well to support this enhancement.

Attention: For more information on setting up leads/contacts and tracking them, refer to the procedures detailed in the “Set Up and Track Lead/Contact Information” section of the online help. You can also see the [Contact and Lead Tracking Clickguide](#) for step-by-step procedures on using the new screens and establishing lead/contact information.

Manage Leads and Contacts (CTMLEAD)

Use this screen to enter and maintain information on leads and contacts and track key details on status, qualified stage, source, and rating.

Leads and contacts are classified as **New Lead**, **Qualified**, and **Disqualified**. Based on the qualified stage and the customer ID/address code/contact ID affiliated with the lead/contact, you can use this screen to view the opportunities and contracts linked to the lead/contact record you are creating or accessing. In addition, you can link a lead/contact record to multiple related leads/contacts.

You can also use this screen to add an affiliation for a new contact for an existing customer or vendor. You can add the new contact directly on the Business Affiliations subtask of this screen as long as a valid customer/vendor ID and a valid address code are selected on the same subtask. When you save the record, Costpoint saves the contact information to the customer/vendor master record and establishes the affiliation to the lead/contact.

Before using this screen, Deltak recommends that you accomplish the other related applications. Some fields/lookup selections in Manage Leads and Contacts require entries to be set up in these applications before they can be used for new records on this screen. Refer to the “Set Up and Track Lead/Contact Information” topic in the online help for more information.

To access the Manage Leads and Contacts screen, click **Contracts » Resources » Leads and Contacts » Manage Leads and Contacts**.

Manage Lead Source Types (CTMSRCTP)

Use this new application to enter and maintain lead source types. These lead source types are used on the Manage Leads and Contacts screen to identify the source of a lead/contact.

There are 10 system-defined lead source types on this screen, and you can also enter new lead source types. You cannot delete system-defined codes, but you can control if codes display in the lookup in the Manage Leads and Contacts application. For user-defined codes, you will not be able to delete a code that has been used in a record on the Manage Leads and Contacts screen, but you can control if the code displays in the lookup in Manage Leads and Contacts.

Access this application through **Contracts » Contract Management Controls » Contract Management Controls » Manage Lead Source Types**.

Manage Lead Rating Types (CTMRTTYPE)

This new application lets you create and manage lead rating types. These lead rating types are used on the Manage Leads and Contacts screen to identify the general rating of a lead/contact.

The three system-defined lead rating codes are **Cold**, **Hot**, and **Warm**, and additional lead rating codes can be entered. You cannot delete system-defined codes, but you can control if codes display in the lookup in the Manage Leads and Contacts application. User-entered lead rating codes that are used in a record in Manage Leads and Contacts cannot be deleted, but you can control if the code displays in the lookup in Manage Leads and Contacts.

Click the following to open this new application: **Contracts » Contract Management Controls » Contract Management Controls » Manage Lead Rating Types**.

Manage Lead/Contact Relationship Types (CTMRELTP)

Use this new screen to enter and manage lead/contact relationship types. These relationship types are used on the Manage Leads and Contacts screen to identify the lead or contact's relationship type.

Seven system-defined relationship type codes are available on this screen. These cannot be deleted, but you can control if codes display in the lookup in the Manage Leads and Contacts application. You can enter new codes. Once you have used these new codes in a record on the Manage Leads and Contacts screen, you will not be able to delete these codes, but you can control if the code displays in the lookup in Manage Leads and Contacts.

To access this new application, click **Contracts » Contract Management Controls » Contract Management Controls » Manage Lead/Contact Relationship Types**.

Manage Leads and Contacts User-Defined Labels (CTMLDLAB)

Use this new application to customize labels for the user-defined fields for leads and contacts. These labels are optional, but if there is additional information that you want to capture about a lead/contact, you can set up labels on this screen.

Open this screen by clicking **Contracts » Contract Management Controls » Resources Controls » Manage Leads and Contacts User-Defined Labels**.

Configure Contract Management Settings (CTMSETNG)

New fields added to this screen allow you to have Costpoint automatically generate lead/contact IDs whenever you add new records in the Manage Leads and Contacts application. Available on the Corporate Settings subtask, these fields are:

- **Auto-Assign Lead/Contact IDs:** Select this check box to have Costpoint automatically assign an ID to any new lead/contact record.
- **Last Lead/Contact ID:** Enter the last lead/contact ID used. You must enter a value in this field if you select the **Auto-Assign Lead/Contact IDs** check box. This field defines the starting point for Costpoint-generated lead/contact IDs.

Manage Opportunities (CTMOPP)

The following fields have been added to the General tab of this screen:

- **Lead Customer:** Enter or select the lead customer that you want to associate with the opportunity. Both regular and prospective customers are allowed in this field.
- **Lead Contact:** Enter or select the contact for the lead customer.

For lead/contact records affiliated with the customer and/or contact you entered in these fields, the opportunity is displayed on the Opportunities subtask of the Manage Leads and Contacts screen. The same logic applies to the **Primary Customer**, **Primary Contact**, **Acquisition Customer**, and **Acquisition Contact** fields in Manage Opportunities.

Manage Contract Management Customer Info (CTMCUST)

This application has been updated to prohibit you from deleting a prospective customer address or prospective customer address contact that is affiliated with a lead or contact record on the Manage Leads and Contacts screen.

Manage Contract Management Vendor Info (CTMVEND)

This application has been updated to prohibit you from deleting a prospective vendor address or prospective vendor address contact that is affiliated with a lead or contact record on the Manage Leads and Contacts screen.

Manage Customers (ARMCUST)

This screen has been updated to prohibit you from deleting a customer address or customer address contact that is affiliated with a lead or contact record on the Manage Leads and Contacts screen.

Manage Vendors (APMVEND)

This screen has been updated to prohibit you from deleting a vendor address or vendor address contact that is affiliated with a lead or contact record on the Manage Leads and Contacts screen.

GovWin IQ to Costpoint Vendor Integration

GovWin IQ compiles vendor information from various sources, including vendor profile information such as classification codes as well as information from the System for Award Management (SAM.gov). SAM.gov information includes whether or not the vendor is on the government exclusion list. This exclusion 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 releases a new API integration screen (Import GovWin IQ Vendor Data) that transfers vendor information from GovWin IQ into Costpoint. This eliminates the need for duplicate data entry and will ensure that the data is updated with no data entry errors. Both vendor and prospective vendor information can be imported and updated.

Other existing screens have been enhanced to alert you if the vendor/subcontractor you selected is on the exclusion list. You still have an option to override the warning and save the vendor/subcontractor in the record if needed. A banner is displayed on select screens to provide additional details on the exclusion for the vendor/subcontractor.

Details for the new screen and all updated applications are listed below.

Import GovWin IQ Vendor Data (APPIQVEN)

The new Import GovWin IQ Vendor Data screen has been added to Costpoint Accounting. This screen allows you to import vendor information from GovWin IQ into Costpoint. Imported data includes SAM.gov exclusion information, North American Industry Classification System (NAICS) codes, various vendor classification information, and the latest date when the information was updated in GovWin IQ.

This screen updates existing Costpoint vendors that have a valid **GovWin IQ Company ID** and do not have the **Do Not Refresh** check box selected on the Manage Vendors screen.

If you are licensed for Contract Management, importing vendor data updates prospective vendor information. If vendor data from GovWin IQ does not match any **GovWin IQ Company ID** of a regular or prospective vendor, Costpoint creates a new prospective vendor.

Configure Vendor Settings (APMSETVN)

The **GovWin IQ Vendor Integration** group box has been added to this screen. It contains the following check box and field:

- **Allow any GovWin IQ Login Account to run Import GovWin IQ Vendor Data for all login Accounts/Companies:** Select this check box to allow any GovWin IQ login account to run the Import GovWin IQ Vendor Data process for all Costpoint accounts or companies. When you select this check box, the **Current Account** and **All Accounts** options on the Import GovWin IQ Vendor Data screen are available for selection. Otherwise, only **Current Account** is enabled and selected by default.
- **GovWin IQ Login Account (Tenant ID):** Use this field to enter the tenant ID that contains the login information that you will use for importing vendor data from GovWin IQ.

Manage Vendor Employees (APMVEMPL)

A new check box, **Active SAM.gov Exclusion**, has been added to this application. This displays only in Table view. If the check box displays as selected, it indicates that the vendor is on the exclusion list in SAM.gov.

Another new field, **Exclusion Banner**, also displays in Table view. If the **Active SAM.gov Exclusion** check box displays as selected, this field displays information about the exclusion for the vendor, including the exclusion type and active and termination dates. In Form view, a read-only banner displays on the screen when a vendor is on the exclusion list. The message also includes the type of the exclusion as well as the active and termination dates of the exclusion.

Note: The exclusion applies to the vendor and not to the individual vendor employee.

Approve Vendor Employees (APMAPRVE)

A new check box, **Active SAM.gov Exclusion**, has been added to the Approve Vendor Employees screen. If displayed as selected, this check box indicates that the vendor is on the exclusion list in SAM.gov.

Note: The exclusion applies to the vendor and not to the individual vendor employee.

Manage Vendors (APMVEND)

This screen has been configured to display updated vendor information imported from GovWin IQ into Costpoint through the Import GovWin IQ Vendor Data screen. Information for GovWin IQ vendor records is updated whenever the integration screen is run. For a single vendor record, information can be updated on the Manage Vendors screen by clicking the new **Refresh from IQ** button in the **GovWin IQ Company Information** group box.

Imported data includes various vendor classification information, NAICS codes, and SAM.gov exclusion information.

Vendor information is updated based on the GovWin IQ company ID. You specify the GovWin IQ company ID in the new **GovWin IQ Company Information** group box added to the Header tab. This group box has the following fields:

Field	Description
GovWin IQ Company ID	<p>This is the vendor's company ID in GovWin IQ.</p> <p>This ID will be stored in the Costpoint database and will be used to determine whether to import new prospective vendors or update existing vendors or prospective vendors when the integration is run.</p> <p>You can modify this field for the vendor. Note, however, that if the vendor record is already refreshed from GovWin IQ, changing or deleting the value in this field will prevent any future refresh from GovWin IQ for the vendor record. Any exclusion information related to the vendor will also be deleted.</p>
Last GovWin IQ Synch	This field displays the date that this record was last updated by the GovWin IQ to Costpoint Vendor integration process.
Last GovWin IQ Analyst Update	This field displays the date that an update was made to the company profile in GovWin IQ.
Do Not Refresh	This check box is enabled only if a value exists in GovWin IQ Company ID . Select this check box to exclude the vendor record from being updated from the GovWin IQ company profile when the GovWin IQ to Costpoint Vendor integration process is run.
Refresh from IQ	Click this button to update the vendor data from the GovWin IQ company profile. This button is enabled only when the Do Not Refresh check box is not selected.

Approve Vendors (APMVENDA)

The Approve Vendors screen has been updated to display a warning message when you attempt to approve a vendor that has an exclusion record on SAM.gov. You can either cancel or continue the approval after the warning message displays.

Manage Contract Management Vendor Info (CTMVEND)

This screen has been configured to display prospective vendors imported from GovWin IQ into Costpoint through the Import GovWin IQ Vendor Data screen. Information for GovWin IQ prospective vendor

records is updated whenever this integration screen is run. For a single vendor record, information can be updated on the Manage Contract Management Vendor Info screen by clicking the new **Refresh from IQ** button on the General tab.

Imported data includes basic vendor details, various classifications, and SAM.gov exclusion information. This information can be helpful when you are working on proposals and budgets and searching for vendors that meet specific criteria.

The integration creates a new prospective vendor record in Costpoint when the GovWin IQ company ID does not exist for a regular or prospective vendor. You specify the GovWin IQ company ID in the new **GovWin IQ Company Information** group box added to the General tab. This group box has the following fields.

Field	Description
GovWin IQ Company ID	<p>This field displays the vendor's company ID in GovWin IQ.</p> <p>This ID will be stored in the Costpoint database and will be used to determine whether to import new records or update existing ones when the integration is run.</p> <p>You can modify this field for the prospective vendor. Note, however, that if the vendor record is already refreshed from GovWin IQ, changing or deleting the value in this field will prevent any future refresh from GovWin IQ for the vendor record. Any exclusion information related to the prospective vendor will also be deleted.</p>
Last GovWin IQ Synch	This field displays the date that this record was last updated by the GovWin IQ to Costpoint Vendor integration process.
Last GovWin IQ Analyst Update	This field displays the date that an update was made to the company profile in GovWin IQ.
Do Not Refresh	This check box is enabled only if a value exists in GovWin IQ Company ID . Select this check box to exclude the prospective vendor record from being updated from the GovWin IQ company profile when the GovWin IQ to Costpoint Vendor integration process is run.
Refresh from IQ	Click this button to update the prospective vendor data from the GovWin IQ company profile. This button is enabled only when the Do Not Refresh check box is not selected.

Note: If you are viewing information for a GovWin IQ regular vendor on this screen, all fields in the **GovWin IQ Company Information** group box are disabled and read-only.

Approve Prospective Vendors (CTMVENDA)

With the addition of new fields to Manage Contract Management Vendor Info, the Approve Prospective Vendors application is updated to transfer the values of those fields from the CT_VEND table to the VEND table when approving prospective vendors. It also transfers exclusion information from the CT_VEND_EXCLS table to the VEND_EXCLS table during approval.

Manage Opportunities (CTMOPP)

On the Potential Resource Details subtask of the Team tab, the lookup of the following fields now includes the **Active SAM.gov Exclusion** check box:

- **Vendor ID**
- **Vendor Employee ID**
- **Prospective Vendor**
- **Prospective Vendor Employee**

If the **Active SAM.gov Exclusion** check box is displayed as selected, it indicates that the vendor or prospective vendor has an active exclusion. For vendor employees and prospective vendor employees, the exclusion applies to the employee's parent vendor and not to the employee.

If you select a vendor (regular or prospective) with this check box selected and save the record, Costpoint displays a message informing you that the vendor has an active exclusion. You can either replace the initially selected vendor, or continue saving the record.

Manage Contracts (CTMCNTR)

Similar changes to those made in Manage Opportunities have been applied to Manage Contracts. On the Potential Resource Details subtask on the Team tab, the lookup of the following fields includes the **Active SAM.gov Exclusion** check box:

- **Vendor ID**
- **Vendor Employee ID**

If displayed as selected, the **Active SAM.gov Exclusion** check box indicates that the vendor has an active exclusion in SAM.gov. If you attempt to add a vendor with this check box selected, Costpoint gives out a warning, but you will still be able to save the record.

Note that only regular vendors and vendor employees are allowed to be added on this subtask in Manage Contracts. An error is displayed when you attempt to add a prospective vendor or vendor employee.

Manage Subcontracts (CTMSBCNTR)

You can now check if the vendor (regular or prospective) that you will associate with the subcontract has an exclusion record from SAM.gov. The lookup of the **Subcontractor/Vendor ID** field on the General tab includes the **Active SAM.gov Exclusion** check box. If displayed as selected, this check box indicates that the vendor is on the exclusion list.

If you select a vendor that is on the exclusion list, upon save, Costpoint gives out a warning message. You can either proceed with saving, or cancel it and select a different vendor.

On the Subcontract Info tab of this screen, the following check boxes have been added to the **Business Classification Requirements** group box:

- **8(a) Certified:** Select this check box if the subcontract requires 8(a)-certified vendors. An 8(a) company is a business that is owned and controlled by socially and economically disadvantaged individuals (usually at least 51% ownership).
- **AbilityOne Non-Profit Agency:** Select this check box if the subcontract requires vendors that are classified as an AbilityOne non-profit agency. An AbilityOne non-profit agency has at least 75% of its total direct labor hours performed by persons who are blind or have significant disabilities.

Other Application Updates

Other updates made to the Manage Opportunities screen include the following:

- You can now import Federal Business Opportunities (FBO) from GovWin IQ into Costpoint. These opportunities have a prefix of **FBO** in their GovWin IQ ID. Previously, **OPP** (opportunity), **BID** (bid), and **TNS** (toons) were the only opportunity types allowed for import into Costpoint.
- Costpoint now allows you to delete an opportunity record that was imported from GovWin IQ. This is helpful particularly for records that were incorrectly imported. In GovWin IQ, make sure to unmark the deleted opportunity record for import into Costpoint; otherwise, this record will be recreated in Costpoint with the next import.

On the GovWin IQ Key Dates subtask (under the GovWin IQ subtask), a new **Line No** column has been added so you can keep track of the order of the opportunity milestone dates that were imported from GovWin IQ into Costpoint.

Initiate Purchase Orders and Purchase Requisitions from Manage Subcontracts

Costpoint now allows you to initiate purchase orders (POs) and purchase requisitions (PRs) from the Manage Subcontracts screen. Through the buttons added to Manage Subcontracts, you can directly access the Manage Purchase Orders and Manage Purchase Requisitions applications in the Materials domain and enter PO and PR information. You can link the PO and PR records to a subcontract record using the **Subcontract ID** field on the Subcontract Information tab of these screens. Costpoint then updates the subcontract record in Manage Subcontracts with the PO and PR details from Manage Purchase Orders and Manage Purchase Requisitions.

More details on the changes in Manage Subcontracts are as follows:

- **Purchase Orders tab:** The following have been added to this tab:
 - **Initiate Purchase Orders:** Click this button to open the Manage Purchase Orders screen.
 - **PO Type:** This new column displays the type of the purchase order linked to the subcontract ID.
 - **PO Balance Remaining:** This new column displays the remaining PO balance for the purchase order linked to the subcontract ID.
 - **Instructions:** This subtask contains instructions for initiating purchase orders from the Manage Subcontracts screen. It informs you that the subcontract ID needs to be manually entered in Manage Purchase Orders for the subcontract information to populate.
- **Requisitions tab:** This is now a display-only tab. Previously, you were able to add requisitions and link them to the subcontract record on this tab. Now, you can link requisitions to a subcontract record via the **Subcontract ID** field on the Subcontract Information tab of the Manage Purchase Requisitions screen.

Note: The SUBCNTR_RQ table previously updated by this tab has been removed. If you used this table before and you upgraded to Costpoint 8.0, the system will insert the subcontract IDs from SUBCNTR_RQ into the RQ_HDR table in order to maintain the link between the subcontract IDs and purchase requisitions.

Other changes on this tab include:

- **Initiate Purchase Requisitions:** Click this new button to open the Manage Purchase Requisitions screen.

- **Instructions subtask:** This new subtask contains instructions for initiating purchase requisitions from the Manage Subcontracts screen. It informs you that the subcontract ID needs to be manually entered in Manage Purchase Requisitions for the subcontract information to populate.
- **New error and warning messages:** The following messages have been added to the **Subcontractor/Vendor ID** field on the General tab to prevent possible issues when linking POs and PRs with subcontracts:

Condition	Type of Message	Message
Vendor is inactive	Error	This vendor cannot be used. It has a status of Inactive in the Manage Vendors screen.
Vendor is for Payroll	Error	This vendor cannot be used as it is a Payroll Vendor.
Vendor is not Approved	Error	Vendor is not approved.
Vendor on Warning Status	Warning	This Vendor is on warning status in the Manage Vendors Screen.
Vendor is Pending Approval	Warning	Vendor is pending approval.

Labor Category Enhancements and Integration with Planning

Manage Opportunities now provides the ability to create labor categories and establish labor criteria requirements specific to a single opportunity, enabling you to make assignments based on labor requirements without the need to immediately assign an individual resource, such as a specific employee or vendor.

Because the labor categories are created from within Manage Opportunities, they can be tailored to the specific needs of the opportunity without adding to the existing store of project labor categories (PLCs) until such time as the opportunity is won.

After the labor category requirements are established, you can add resources leveraging those requirements, and to facilitate this process, all potential resources (employee, vendor, generic staff, and so forth) are now combined in a single subtask table.

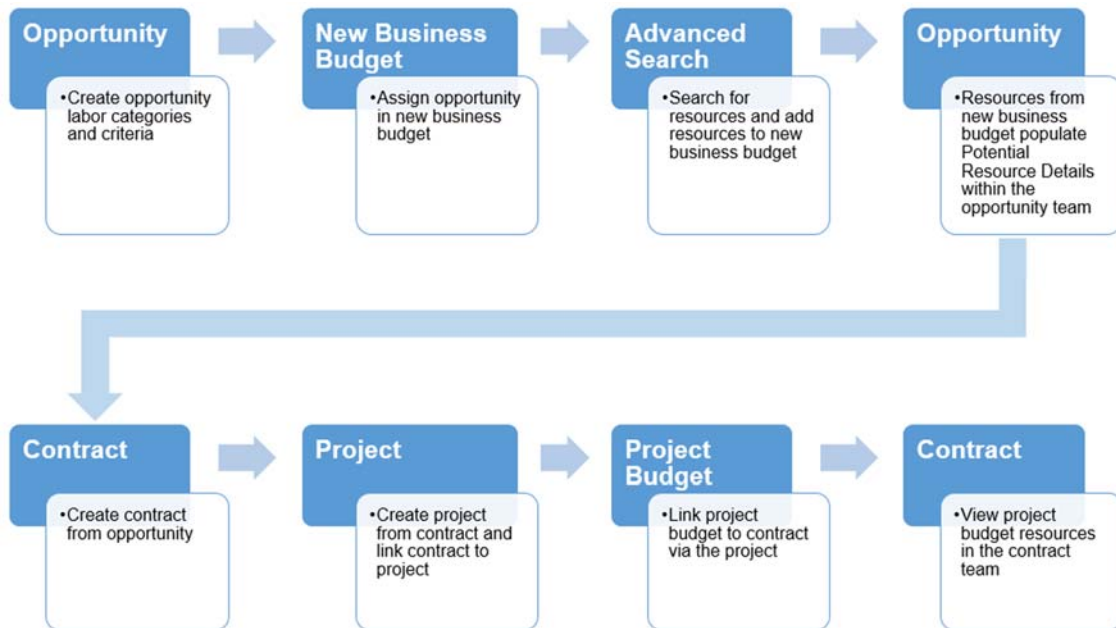
To further increase the usability of this feature, if you use Costpoint Planning, you can now link the two applications so that labor category-related information is shared between them. For example, when a new business budget is created and linked to an opportunity, the labor categories created in Manage Opportunities are available for selection in Planning. You can use the labor category in the Advanced Search feature in Planning to search for actual resources who meet the required criteria. Any resources added to the new business budget are added to the opportunity as potential resources.

Similarly, labor category information created in Manage Opportunities can be shared with Manage Contracts, as you now have the ability to load labor categories from an opportunity to an associated contract. Note also that Manage Contracts includes the same labor category-related subtasks that exist in Manage Opportunities.

Manage Contracts also has the ability to link to Costpoint Planning. When a project budget is linked via a project to a contract, the contract can be opened from within the project budget, and resources added to the project budget can be viewed in Manage Contracts as project budget resources.

Contracts

Below is a summary of how information flows between the Contracts and Planning domains for this enhancement.



Attention: For more details on leveraging the Planning domain in setting up teams for opportunities and contracts, refer to the “Opportunity and Contract Teams and Integration with Planning” topic in the online help.

For additional information on the respective updates in Planning, see [“Integration with Costpoint Contracts.”](#)

Manage Opportunities (CTMOPP)

You can now define labor categories and required criteria in Manage Opportunities to help you match work force requirements against resources at the planning stage. New fields and subtasks have been added to the screen to capture this information and to enable integration with the Planning domain if you are licensed for Costpoint Planning.

On the main screen, the following items are now available:

- **Use Planning:** Select this check box if you want to leverage resource information from the new business budget in the Planning domain in setting up team information for the opportunity. Once **Use Planning** is enabled, opportunity data in the Contracts domain will be shared with the Planning domain, and some Planning data will also flow through the Contracts domain. Note that this check box displays only if you are licensed for Costpoint Planning.
- **New Business Budget ID:** This field displays only if you selected **Use Planning**. It displays the ID of the new business budget linked to the opportunity through the New Business Budgets screen in Planning.

Major updates on the Team tab include the addition of these new subtasks:

- **Labor Categories:** Use this subtask to define labor categories that can help you identify resources that meet specific criteria needed for the opportunity. You can manually assign multiple resources to a labor category, or you can have them loaded from Costpoint Planning. Once

resources have been assigned, changes to the labor category depend on the settings selected in the new **Labor Category Options** group box on the Configure Contract Management Settings screen.

- **Required Criteria:** This subtask is available under Labor Categories. Use this subtask to define the criteria required for resources needed for the opportunity for a specific labor category. Criteria include skills, training, courses, and other work force requirements. If **Use Planning** is selected, these criteria (together with the opportunity ID and labor category) will be available in Planning. The Advanced Search subtask of the New Business Budgets and Budget By Resource screens pulls in resources that match the criteria for the selected labor category, and you can choose to add these resources to the new business budget. Once the budget is committed, these resources are loaded to the Potential Resource Details subtask in Manage Opportunities.
- **Potential Resource Details:** This subtask replaces the Potential Work Force Employees subtask. Various types of resources can be set up on the new subtask, while the previous version included just employees.

Use this subtask to add or view resources that may be included in the bid and proposal process for the opportunity and those that could potentially work on the future contract. Resources include:

- Employee
- Generic Staff
- Vendor
- Vendor Employee
- Prospective Vendor
- Prospective Vendor Employee

If **Use Planning** is selected, you will not be able to manually add records to this subtask as all resources will be loaded from Planning. You also cannot delete records that were added through Planning; however, you can add and edit additional information to the records, including the PLC code, default PLC indicator, **Include in Work Force** check box, and other fields.

Another change to the Team tab is on the Opportunity Teammates/Competitors subtask. This has been renamed to Opportunity Primes/Competitors. Fields no longer include options for subcontractors, and the Vendor Employees subtask has been removed as adding subcontractors has been moved to the Potential Resource Details subtask. The **Teammate/Competitor** field has been renamed to **Prime/Competitor**, while the following have been removed:

- **Include in Work Force** check box
- **PLC** field
- **Default PLC** check box

On the Status tab, validations have been added to the opportunity **Date Opened** and **Date Closed** fields. When modifying these dates, Costpoint alerts you if the labor category period of performance (POP) start date is earlier than the updated opportunity start date, or if the labor category POP end date is later than the updated opportunity end date.

The Project Initialization subtask has been updated so that the resources on the Team tab are correctly added to the work force when you initialize projects in the Contracts domain. Note, however, that prospective vendors and customers are not included in the mass add/update process.

New database tables added for this enhancement are:

- CTM_LAB_CAT

- CTM_LC_CRITERIA
- CTM_LC_RESOURCE

The OPP_WORKFORCE_EMPL table, on the other hand, has been removed.

Manage Contracts (CTMCNTR)

To ensure seamless flow of information from opportunities to contracts, similar enhancements to those made in Manage Opportunities have been made to the Manage Contracts screen.

On the main screen, the same **Use Planning** check box is added to allow you to leverage the Planning domain functionality in setting up team information for the contract. If you select this check box and the contract is linked via a project to a project budget in Planning, resources added to the project budget will be viewable on the Project Budget Resources subtask.

Unlike in Manage Opportunities, regardless of how **Use Planning** is set, you will be able to manually enter records on the Potential Resource Details subtask in Manage Contracts.

On the Team tab, the new subtasks added are the following:

- **Labor Categories:** Use this subtask to define labor categories that can help you identify resources that meet specific criteria needed for the contract. You can manually add labor categories or load them from the opportunity associated with the contract. You can also manually assign potential resources to a labor category or load them from the opportunity. Once resources have been assigned, changes to the labor category depend on the settings selected in the new **Labor Category Options** group box on the Configure Contract Management Settings screen.
- **Required Criteria:** This subtask is available under Labor Categories. Use this subtask to define the criteria required for resources needed for the contract for a specific labor category. Criteria include skills, training, courses, and other work force requirements.
- **Potential Resource Details:** This new subtask replaces the Potential Work Force Employees subtask. Various types of resources can be set up on the new subtask, while the previous version included just employees.

You can manually enter records on this subtask or load potential resources from the opportunity linked to the contract. Resources that could potentially be added to the project associated with the contract include:

- Employee
- Generic Staff
- Vendor
- Vendor Employee

Note: **Prospective Vendor** and **Prospective Vendor Employee** are available in the **Resource Type** drop-down list but are not allowed to be added as potential resources for the contract.

- **Project Budget Resources:** Use this subtask to view project budget resources that were added to the related project budget in Costpoint Planning. This subtask is visible on the Team tab only if you have selected the **Use Planning** check box on the main screen. Resources display on the subtask if any Planning project budget (with resources) is linked to the contract.

Other changes on the Team tab are on the following subtasks:

- **Labor Rates:** The **PLC** field is now required on this subtask. Only PLCs defined on this subtask will be available for entry/selection on the Labor Categories subtask of Manage Contracts.

- **Contract Primes:** Previously named as Contract Teammates, this subtask now only allows addition of prime contractors as subcontractors/vendors can be added through the Potential Resource Details subtask. Some fields have been renamed, while the following subtask and fields have been removed:
 - Vendor Employees subtask
 - **Prime/Subcontractor** field
 - **Include in Workforce** check box
 - **PLC** field
 - **Default PLC** check box

On the Dates tab, validations have been added to the contract **Period of Performance** date fields. When modifying these dates, Costpoint alerts you if the labor category POP start date is earlier than the updated contract start date, or if the labor category POP end date is later than the updated contract end date.

The Project Initialization subtask has been updated so that the resources on the Team tab are correctly added to the work force when you initialize projects in the Contracts domain.

Similar with Manage Opportunities, the Manage Contracts screen now updates the following new tables:

- CTM_LAB_CAT
- CTM_LC_CRITERIA
- CTM_LC_RESOURCE

The CNTR_WORKFORCE_EMPL table, on the other hand, has been removed.

Configure Contract Management Settings (CTMSETNG)

On the Corporate Settings subtask of this application, the **Labor Category Options** group box has been added so you can specify how Costpoint should handle labor categories once resources have been assigned to them on the Manage Opportunities or Manage Contracts screen. This group box has the following options:

- **Do not allow changes once resources are assigned:** If you select this option, no changes to the opportunity or contract labor categories will be allowed. Costpoint displays an error message if the user attempts to make changes to a labor category.
- **Allow changes once resources are assigned:** If you select this option, any changes to the labor category will be allowed. No message is displayed, unless you select the **Provide Warning** check box.
- **Provide Warning:** This is enabled only if you selected **Allow changes once resources are assigned**. If you select this check box, Costpoint displays a warning message when the user makes changes to the labor category, but the user will still be able to save the record.

Approve Prospective Vendors (CTMVENDA)

If a prospective vendor or its related employee is assigned to a new business budget in Planning, upon approval of the prospective vendor, Costpoint automatically updates the resource type from prospective vendor (or prospective vendor employee) to regular vendor (or vendor employee) on the New Business Budgets screen in Planning. The related vendor or vendor employee ID is updated as well.

Print Vendor Employee Detail Report (APRVEMPL)

The **Vendor Name** column has been added in the lookup of the **Vendor Employee** field to help you easily identify the vendor employee record you want to select.

Configure Vendor Settings (APMSETVN)

The **Vendor Name** column has been added in the lookup of the **Last Vendor Employee ID** field to help you easily identify the vendor employee record you want to select.

Migrate GovWin Capture Management Data (AOPCPDAT)

The Migrate GovWin Capture Management Data screen has been updated to support the transfer of vendor information from the Primes subtask (previously labeled as Teammates subtask) to the Potential Resource Details subtask on the Team tab of the following screens:

- Manage Opportunities
- Manage Contracts

The application will use updated mapping and criteria for migrating vendor information from GovWin Capture Management to Costpoint Contracts.

New Opportunities Quick View Application

The new Opportunities Quick View (CTMOPPM) application added to the Contracts domain enables you to quickly access information on your opportunities and related activities. This is a condensed form of the Manage Opportunities screen, consisting of select fields that display information you access most often. Data that displays includes, but is not limited to, the following:

- Opportunity ID, name, and description
- Opportunity status and key dates
- GovWin IQ information
- Employee team, prime contractors, and competitors
- Activities and user-defined information

Except for the Activities subtask (where you can enter new activities for the opportunity), all fields and subtasks on this screen are read-only, but you can do a query to search for opportunity data.

You can access this screen both in Costpoint web and in Costpoint Mobile. Costpoint can be deployed on mobile devices (such as Android devices, iPhone, and iPad) as well as on desktops. On mobile devices, this screen's UI is configured such that you have the best view when accessing your opportunity data in portrait and landscape forms. In a few clicks or swipes, you can navigate through the screen and search for the information you are looking for.

Supplier/Vendor Rating Added to Manage Contract Management Vendor Info

Previously, 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.

Now, the new Supplier/Vendor Rating tab added to the Manage Contract Management Vendor Info screen allows you to view consolidated supplier/vendor ratings for a specific supplier/vendor in just one location. This tab is a read-only presentation of the ratings on the Manage Contracts and Manage

Contracts

Subcontracts screens (that is, you still need to enter ratings in Manage Contracts and Manage Subcontracts). It contains the Supplier/Vendor Rating subtask, where you can view the scores of the supplier on the following evaluation areas:

- Responsiveness/Innovation
- Customer Service, Quality and Delivery
- Financial
- Relationship

A new field, **Average Rating**, has also been added to this screen. This field displays the average rating of a specific supplier/vendor. Costpoint derives this value by averaging the supplier/vendor ratings entered in Manage Contracts and Manage Subcontracts.

Note: The new tab and the new field are visible only for regular vendors and are hidden for prospective vendors.

The VEND database table is updated to include a new column (AVG_RATING_PERCENT) that will store the average rating of regular vendors. The functionality of the Manage Contracts and Manage Subcontracts applications has also been updated to ensure that the new column in VEND is updated whenever a rating is added or changed on these screens.

Projects

This section describes Costpoint 8.0 enhancements for the Projects domain.

Hold Status Added to Standard Bills

A new **Hold** status for standard bills has been added to allow users to keep these bills in a static state after manual adjustments are made after bill calculation.

Note: This enhancement is applicable only to standard bills and not to other bill types.

The following screens have been updated:

- **Manage Standard Bills (BLMGBILL):** The **Status** drop-down list on the Standard Billing Info tab now includes **HOLD**. If you select this option for the bill, Costpoint will not calculate/recalculate values for the bill when you run Calculate Standard Bills. The system will also not post the bill.
- **Select Bills for Posting (BLPSELECT):** The **Set Billing Status** drop-down list now includes **Hold**. If you select this option, Costpoint mass updates the status of the selected range of bills to **Hold**.

Note: Mass updating to **Hold** is allowed only for standard bills. If you select **Progress Payment Bills** in **Select Bill Type** and run the screen, Costpoint throws an error message.

- **Calculate Standard Bills (BLPGBILL):** This screen has been updated to not overwrite values for standard bills on hold. When you try to calculate bills in a **Hold** status and there are no bills in an **Unselected** status, a validation message displays.
- **Post Standard Bills (BLPGEN):** This screen has been updated to not post standard bills on hold. When you try to post bills in a **Hold** status and there are no bills in a **Selected** status, a validation message displays.

Task Order Number Added to Standard and Milestone Bills

You can now print task order numbers in standard and milestone bills. This lets you avoid manual manipulation of invoices to indicate the task order number.

The following applications have been updated for this enhancement:

- **Calculate Standard Bills (BLPGBILL):** This is updated to bring the task order number value from the PROJ table into the BILL_EDIT_INVC_HDR table.
- **Manage Generic Billing Formats (BLMBFRM):** The **Show Task Order Number** and **Show Customer PO** check boxes are now available on the Header tab of this screen. Select these options to print the customer purchase order (PO) number and task order number on the header of the bill.
- **Print Standard Bills (BLRMBIL):** This now prints the task order number and customer PO number on the header of the bill, if the options to display these values are selected on the Manage Generic Billing Formats screen.
- **Post Standard Bills (BLPGEN):** When posting bills, this application brings in the task order number from the BILL_EDIT_INVC_HDR table to the BILL_INVC_HDR_HS and BILL_EDIT_HDR_CUM tables.

- **Reverse Previous Bills (BLPREVB):** When reversing previous bills, this application updates the task order number in the BILL_EDIT_INVC_HDR table using the value from the BILL_INVC_HDR_HS table.
- **Print ACRN Billing Edit Report (BLRACRN):** This now prints the task order number and customer PO number on the header of the bill, if the options to display these values are selected on the Manage Generic Billing Formats screen.
- **Manage Milestone Percent Complete Bills (BLMMPCB):** The **Task Order** and **Subcontract** check boxes have been added to the Report Options tab of this screen. Select these options to print these values on the header of milestone bills.

The task order number and subcontract number come from the Details tab of the Manage Project User Flow screen, but you can modify these values in the new **Task Order** and **Subcontract** fields on the Bill Details tab of Manage Milestone Percent Complete Bills.
- **Print Milestone Percent Complete Bills (BLRMPCB):** This now prints the task order number and subcontract number on the header of the bill, if the options to display these values are selected on the Manage Milestone Percent Complete Bills screen.
- **Post Milestone Percent Complete Bills (BLPMPCB):** When posting milestone bills, this application now brings in the task order number and the subcontract number from the MILESTONE_INVC_HDR table to the MILESTONE_HDR_HS table.

For standard bills, the TASK_ORDER_NO column has been added to the following tables to store the value for the task order number:

- BILL_EDIT_INVC_HDR
- BILL_INVC_HDR_HS
- BILL_EDIT_HDR_CUM

For milestone bills, columns TASK_ORDER_NO and SUBCTR_ID are added to the following tables to store the task order and subcontract numbers:

- MILESTONE_INVC_HDR
- MILESTONE_HDR_HS

The DELTEK.BILL_FRMT table is also updated with two new columns (HD_CUST_PO_ID and HD_TO_NO_ID) to store the value of the **Task Order** and **Subcontract** check boxes in Manage Milestone Percent Complete Bills.

Planning

This section describes version 8.0 enhancements for Costpoint Planning.

Direct Integration with Costpoint and Menu Updates

Application Codes Removed from Planning Menu Items

Previously, the application codes from the Budgeting and Planning 6.1 menu items were added to the menu items in Planning 7.0 so users can easily find the applications in the new version.

For Costpoint Planning 8.0, all of the application codes were removed to be consistent with the rest of the Costpoint menu items.

Imported Table Data Replaced by Link Views

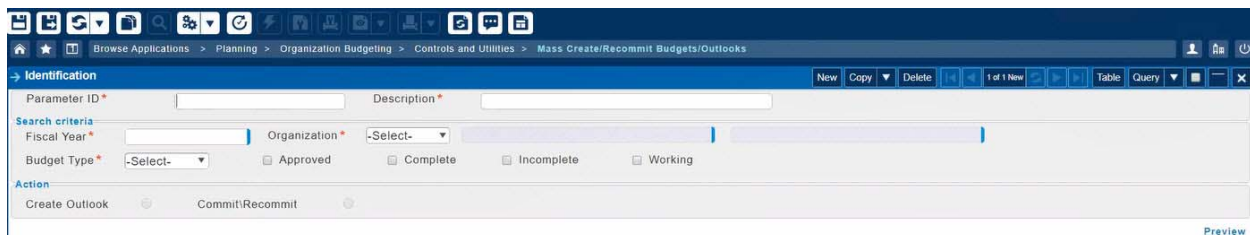
Backend integration between Costpoint and Costpoint Planning was enhanced to reduce the number tables requiring update through the refresh process. A majority of tables are now updated through a more direct integration, and although the refresh process is still required, the runtime is shorter.

New Mass Processing Utility for Updating Org Budgets/Outlooks

Organization Budgeting now includes a new utility that, depending on selected query options, enables you to apply three budget processes to all or a range of organizations, rather than to just a single organization. Using this mass processing application, you can:

- Generate new outlooks from approved budgets/outlooks.
- Commit Working status budgets.
- Update and recommit Complete/Incomplete budgets or outlooks with global changes, such as those made to costpools or default labor rates. (This ability depends on Org Budgeting configuration as described below.)

To access the application, click **Planning » Organization Budgeting » Controls and Utilities » Mass Create/Recommit Budgets/Outlooks**.




After selecting query criteria, such as choosing the fiscal year, the organizations (all or a range), and the type of budget (Outlook or Budget) and budget statuses, click **Preview** to confirm the results, and then click from the toolbar to process your selections. Following processing, and depending on your selections, the utility will:

- Create Working status outlooks from approved budgets/outlooks if Approved was selected.
- Commit Working status budgets/outlooks and update the statuses to Incomplete if Working was selected.

- Update Incomplete/Complete budgets/outlooks with any global changes (for example, modifications to PTO setup) made in Organization Budget Cycle Initialization if:
 - Incomplete or Complete was selected.
 - The current fiscal year is selected.
 - The Org Budget Revenue Calculation setting on the Organization tab of Configuration Settings is selected as Org Revenue Calculation.

Note: During processing, Incomplete and Complete budgets are temporarily updated to Working to enable budget recalculations, but the original statuses are reset upon completion.

The utility will not process budgets where the setup process is incomplete.

To check the result, click **Organization Budgeting » Budget Outlook Processing » Organization Budgets/Outlooks**, and click  from the toolbar. This will refresh the Organization Budget Status grid.

Similar to other Costpoint processing applications, you can save query parameters for later reuse or for running the process as a scheduled job.

Please see the *Mass Create/Recommit Budgets/Outlooks* online help topic for detailed screen information and instructions on how to run the utility.

Integration with Costpoint Contracts

Costpoint Planning and Costpoint Contracts were integrated in key areas to allow direct, one-to-one linking of new business budgets to opportunities and of project budgets to project contracts.

The connection is enabled through a new **Use Planning** setting that was added to both Manage Opportunities and Manage Contracts in Costpoint Contracts. The setting, when selected, makes an opportunity or contract accessible to Costpoint Planning.

Note: See [“Labor Category Enhancements and Integration with Planning”](#) to learn how to enable the integration in Costpoint Contracts, as well as to learn about other labor and team-related updates.

When **Use Planning** is selected in Manage Opportunities, the opportunity ID and information from the Team Management tab, such as labor categories and skills criteria, are accessible in New Business Budgets and Budget by Resource, as well as in Advanced Search when used from either application.

Note: See [“Advanced Search Enhancement”](#) for details on using the integration when searching for resources and to learn about using the new Multi-Select and % Match features for targeted searching.

In Project Budgets/EACs, a new hyperlinked field provides access to the linked project contract, which is either read-only or editable depending on user rights.

Continue reading below to learn about using the integration within Costpoint Planning.

Integration Updates to New Business Budgets


The **New Business Budgeting » Actions/Processing » New Business Budgets** application includes new options that allow you to access an opportunity where **Use Planning** is selected and which has not already been linked to another new business budget.

Updates to the New Business Budget Status Table

The New Business Budgets Status table includes a new **Opportunity ID** column. This column is integrated with Manage Opportunities in Costpoint Contracts and allows you to establish a direct link between the new business budget and an active opportunity, if **Use Planning** is selected on the opportunity record.

If the budget is not yet linked to an opportunity, this field displays a value of None.

You can only link to an opportunity at the top level of the budget, and the Opportunity ID saved at that level is automatically applied to the lower levels.

Click  to display the opportunities that are available for linking. Choose the opportunity to which you want to link and click **Select**.

After you save the record, the Opportunity ID is applied to all existing levels and displays as a hyperlink, which opens the opportunity record in Manage Opportunities. The record is read-only or editable depending on user rights.

After the link is established, note the following:

- The ID can only be changed if no completed budgets exist.
- You receive a system message if the status of the opportunity changes from active to inactive.

Updates to the Hours Subtask

This section describes changes made to the Hours subtask related to vendor information and opportunity labor categories.

If the new business budget is linked to an opportunity, vendor information from Contract Management populates the **ID Type** lookup with values for the following:

- Prospective Vendor
- Prospective Vendor Employee

The above values are available only when you are budgeting subcontractor or consultant hours. If the status of a vendor or vendor employee is later upgraded to Approved, the ID number is automatically updated. When the budget is opened, the old Prospective ID and the new approved ID is displayed for any changes.

A new **Opportunity Labor Category** field was also added to the Hours Subtask. This field displays if the budget is linked to an opportunity in Costpoint Contracts. This field is disabled if ID Type is selected as Key Entry, PLC, or GLC.

Click  to assign an opportunity labor category for the selected resource.

The lookup values populate from the Labor Categories table on the Manage Opportunities screen, and because the integration is bidirectional, the resource information is applied to the Potential Resources Details table in Manage Opportunities after the budget is committed.

Integration Updates to Budget By Resource

The Add/Edit/Delete Assignments subtask in **Resource Planning » Resource Planning » Budget By Resource** includes a new **Opportunity Labor Category** lookup that is enabled if you are budgeting hours for a new business budget that is also linked to an opportunity in Manage Opportunities.

Click  to assign an opportunity labor category for the selected resource.

The lookup values populate from the Labor Categories table on the Manage Opportunities screen, and because the integration is bidirectional, the resource information is applied to the Potential Resources Details table in Manage Opportunities after the budget is committed.

In addition, a new **Opportunity ID** field displays the Opportunity ID associated with the new business budget if the selected resource is assigned to a new business budget that is linked to an opportunity, and you have saved the resource record.

Note: See “Advanced Search Enhancement” below to learn more about searching for resources according to opportunity labor category and skill requirements.

Integration Updates to Project Budgets/EACs

The **Project Budgeting » Budget/EAC Processing » Project Budgets/EACs** application includes two new fields that display if the budget is linked to a contract. These fields, which display in form view only, are:

- **CTM Contract ID:** If the project is linked to a contract in Contract Management, this field displays the contract ID. Depending on your user rights, you can click the hyperlinked ID number to either edit the contract or view the contract (read-only).
- **CTM Contract Name:** This field displays the name of the contract from Contract Management.

Advanced Search Enhancement

The Advanced Search functionality was updated to include new resource types and search categories, as well as new fields related to the integration of Planning with Costpoint Contract Management.

Although the Advanced Search subtask is available from three applications (Budget by Resource, New Business Budgets, and Project Budgets/EACs), not every update described in this section affects all three applications in exactly the same way. These differences are noted throughout.

Due to the integration of Planning with Costpoint Contract Management, Advanced Search in New Business Budgets and Budget by Resource includes two new fields (**Opportunity ID** and **Opportunity Labor Category**) that allow you to search for the labor categories already established on the Team tab in Manage Opportunities.

Note that in Advanced Search for New Business Budgets, **Opportunity ID** is a default value already established when the budget was created.

For more information, see the Integration with Costpoint Contract Management feature.

New Resource Types and Search Categories

In addition to the existing Resource Types of Employee and Vendor Employee, the **Resource Type** group box now includes two new check boxes:

- **Contract Employee**
- **Vendor**

Different Resource Types are available depending on where you access Advanced Search:

Screen	Available Resource Type
Budget By Resource	Employee Contract Employee Vendor Vendor Employee
New Business Budgets » Hours subtask	Employee Contract Employee Vendor Vendor Employee
Project Budgets/EACs » Staff Hours subtask	Employee
Project Budgets/EACs » Subcontractor Hours subtask	Contract Employee Vendor Vendor Employee
Project Budgets/EACs » Consultant Hours subtask	Contract Employee Vendor Vendor Employee

New resource search categories have also been added. While the current categories (Manager, Skills, Organization, Credentials, and General Labor Category) are still available, the **Resource Search Criteria** group box now includes the following new fields:

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

To streamline the selection of criteria, the search category fields were 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.

For each search category (both new and existing ones), the table below indicates the resource type for which it is available and whether the multi-selection feature is enabled.

Field	Enabled for Resource Type	Multi-select and Logic Operator
ITAR Required	Employee Contract Employee Vendor Employee	N
Manager	Employee Contract Employee Vendor Employee	Y (or)
Skills	Employee Contract Employee Vendor Employee	Y (and)
Socioeconomic Status	Vendor	Y (or)
Location	Employee Contract Employee Vendor Employee	Y (or)
Organization	Employee Contract Employee	Y (or)
Credentials	Employee Contract Employee	Y (and)
NAICS	Vendor	Y (and)
US Citizenship Required?	Employee Contract Employee Vendor Employee	N
General Labor Code	Employee Contract Employee Vendor Employee	Y (or)
Clearance	Employee Contract Employee	N

Resource Table % Match and Multi-Select Functionalities

The Resource table, which displays the resources that matched your search criteria, now has the multi-select functionality. You can select multiple resources by holding the **CTRL** key while selecting records or select a range of records by holding **SHIFT** and clicking the beginning and end of the range.

The Resource table also includes the new **% Match** column that indicates how closely each result matches the selected criteria.

Costpoint calculates the **% Match** for a resource type depending on the search criteria you select and if the criteria have the multi-select function.

For criteria that do not have multi-select or have multi-select with an OR logic operator, 100% is divided by the number of search criteria you select. If the resource matches a criterion, that criterion gets the whole portion from the divided percentage.

For example, you select the resource type **Employee**. In the **Resource Search Criteria** group box, you select an option on the **ITAR Required** (no multi-select) drop-down list and select multiple options on the **Manager** (multi-select, OR) drop-down list. 50% is allotted for each criterion.

If the resource matches the ITAR authorization you selected, it gets the whole 50% allotted for the **ITAR Required** criterion. If the resource matches at least one option you selected on the **Manager** drop-down list, it also gets the whole 50% allotted for the **Manager** criterion, making the resource a 100% match.

For search criteria that have the multi-select function with an AND logic operator, each option you select is added to the divisor by which 100% is divided. The criterion itself is not included in the divisor.

For example, you select the resource type **Employee**. In the **Resource Search Criteria** group box, you select an option on the **ITAR Required** (no multi-select) drop-down list and select three skill codes on the **Skills** (multi-select, AND) drop-down list. 100% must be divided between one criterion without multi-select and the three skill codes, making the divisor '4'. 25% is allotted for the **ITAR Required** criterion, and each skill code you selected also gets 25%. If the resource matches the ITAR authorization and only one of the skill codes, it becomes a 50% match.

Budget Versioning and the Ability to Do “What-If” Scenarios

Budget versioning was added to Project Budgets / EACs and New Business Budgeting, enabling you to create and apply versioning codes and descriptions. (for example, “aggressive” or “conservative”) to multiple versions of the same budget and, after designating one version as final, run reports according to version, or in some reports, compare versions using a new **What If** option.

Final versions will be applied to project budget rollups and, depending on configuration, to Org Budgeting as well.

Manage Budget Version Codes

The Manage Budget Version Codes screen has been added in **Planning » Administration » Administration Controls**. Use this screen to create budget version codes and descriptions that you can use to label different versions of a project budget/EAC or new business budget.

Version Code *	Version Code Description *
N/A	None
VR1	Code1
VR2	Code2
VR3	Code3


It contains the following columns:

Column	Description	Format (Length)
Version Code	This is a 3-letter abbreviation of the label you want to use for a budget version.	Alphanumeric (3)
Version Code Description	This is the definition of the label you want to use for a budget version.	Alphanumeric (25)

Ability to Create Multiple Versions with Descriptions

The New Business Budgets screen has been updated to allow you to create multiple versions of a new business budget and assign a code to each version you create.

The following columns have been added to the screen:

Column	Description
Version Code	<p>Enter, or click  to select, a code you want to assign to the current version. The lookup displays version codes entered on the Manage Budget Version Codes screen.</p> <p>If the budget is imported from Excel, the version code defaults to N/A.</p>
Final Version	<p>Select this check box to mark the version as final. For each budgeted level, you must mark one version with a Status of Complete as final. If no version is marked as final, an error message displays and the record cannot be saved.</p> <p>Versions marked as final are included in reports. (Those with a Work Type of Proposal that are marked as final are not included in project budget and some organization budget reports.)</p> <p>They are also integrated with an organization budget if your company uses the integrated method to calculate Org revenue.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: The integrated method is in effect when Org Budget Revenue Calculation in Configuration Settings is not selected as Org Revenue Calculation. Contact your System Administrator for questions regarding this setting, which is configured during initial system setup and should not be changed.</p> </div>

Updates to New Business Budgeting Reporting (Display Budget Version Codes)

Screens in the Reports/Inquiries application group have been updated to include different versions of a new business budget in the reports.

This affects the following screens:

- New Business Budget Summary (Revenue/Cost)
- Multi-New Business Budget Consolidation (Revenue/Cost)
- Structured New Business Budget Summary (Revenue/Cost)

The **Version Code** column is added to all three screens to identify which version of a budget is included in the report.

When you view budget summaries on the New Business Budget Summary (Revenue/Cost) and Structured New Business Budget Summary (Revenue/Cost) screens, only versions marked as final will be included.

While on the Multi-New Business Budget Consolidation screen, all versions that have a **Status** of **Complete**, including those which have the **Final Version** check box cleared, will be included. In addition, since the **Version Code** column is now available on this screen, you can now group budgets according to their version codes.

Manage User-Defined Information for New Business Budgets

The Manage User-Defined Information screen has been added in **New Business Budgeting » Controls and Utilities**. Use this screen to enter data in the user-defined fields for a new business budget.

New Business ID	New Business Description
10100	
AJAR1	AJAR1
AJAR1.001	AJAR1.001
AMY01	
AMY01.01	
AMY01.01.001	
AMY01.01.001.001	
AMY01.01.001.001.001	

Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
D	END DATA					N	N
T	NAICS CODE	NAICS CODE				Y	Y
N	NUMBER1					N	N
N	NUMBER2					N	N
D	START DATE					N	N
T	TEXT1					Y	N
T	TEXT2					Y	N
T	TEXT3					Y	N

The labels that display for each type of user-defined field are first set up in **Projects » Project Setup » Project Setup Controls » Manage User-Defined Labels**.

The information entered on this screen is optional and can be set up at any time. This screen is also available as the User-Defined Info subtask on the New Business Budgets screen.

Add User-defined Info Subtask to New Business Budgets

The User-Defined Info subtask has been added to the New Business Budgets screen. Use this subtask to enter data in the user-defined fields for a new business budget. The labels that display for each type of user-defined field are first set up in **Projects » Project Setup » Project Setup Controls » Manage User-Defined Labels**.

Data Type	Labels	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
D	END DATA					N	N
T	NAICS CODE	NAICS CODE				Y	Y
N	NUMBER1					N	N
N	NUMBER2					N	N
D	START DATE					N	N
T	TEXT1					Y	N
T	TEXT2					Y	N
T	TEXT3					Y	N

This subtask is also available as a standalone application: **New Business Budgeting » Controls and Utilities » Manage User-Defined Information**.

Project Budgeting Updates

Screens in the Project Budgeting module have been updated to allow you to create multiple versions of a budget/EAC.


The Revenue Integration screen and screens under the Top Level (All Projects) Reports, Level Down Reports, and Supplemental Reports application groups have also been updated to use the final version of a project budget/EAC in the reports.

Screens under Active Level Reports allow comparison between cost and a budget/EAC version or a budget/EAC version and another version if you select the new **What If** report type.

Add Columns for Version Codes and Final Version Check Box on Project Budgets/EACs

The Project Budgets / EACs screen has been updated to allow you to create multiple versions of a project budget/EAC and assign a code to each version you create.

The following columns have been added to the screen:

Column	Description
Version Code	<p>Enter, or click  to select, a version code you want to assign to the current version. The lookup displays version codes entered on the Manage Budget Version Codes screen.</p> <p>If the budget is imported from Excel, the version code defaults to N/A.</p>
Final Version	<p>Select this check box to mark the version as final. You must select one committed budget and EAC as final. If no version is marked as final, an error message displays and the record cannot be saved.</p> <p>Versions marked as final are included in reports. They are also integrated with an organization budget if your company uses the integrated method to calculate Org revenue.</p> <div> <p>Note: The integrated method is in effect when Org Budget Revenue Calculation in Configuration Settings is not selected as Org Revenue Calculation. Contact your System Administrator for questions regarding this setting, which is configured during initial system setup and should not be changed.</p> </div>

Unlock Approved Project Budgets

The Project Budgets / EACs screen has been updated to allow you to unlock and modify an approved budget without deleting versions created after that version. You can modify an approved budget/EAC by clearing the **Approved** check box and saving the record. The record you modified will have a **Status** of **Complete**, and a new version of that budget/EAC with a status of **Working** will be created.

This update also allows you to create a new version of an approved budget based on a version created prior to the latest one. In contrast to the functionality before this enhancement where you can only create a new version based on the latest version of a budget/EAC, you can now select any version and click **Create Bud** or **Create EAC** to create a new version of that budget/EAC.

Revenue Integration to Use Final Budget/EAC Versions

The Revenue Integration screen has been updated to use the final version of a budget/EAC when you view, calculate, and approve, by project, the latest Estimate to Complete (ETC), Estimate at Completion (EAC), and the % Complete amounts. **End Date** is now a required field.

The **Version** column has been added to the Projects and History subtasks.

On the Projects subtask, when you click the **Calculate** button, the version number and version code of the budgets/EACs display in the **Version** column.

When you click **Approve** and **Upload** on the Projects subtask, the History subtask is populated, and the version number and version code of the budgets/EACs display in the **Version** column on the History subtask as well.

Updates to Project Budgeting Reporting

Multiple updates have been applied to different reporting screens in the Project Budgeting module.

Screens in the Top Level (All Projects) Reports, Level Down Reports, and Supplemental Reports application groups have been updated to use the final version of a project budget/EAC when you select **Budget** or **Variance** as the **Report Type** and you select **Budget** or **EAC** as the **Budget Type**.

If you select **Variance** as the **Report Type**, the **Source** column, which contains the budget type, version number, and version code of the budget/EAC, displays on the subtasks of the report screens.

Note, however, that not all updates were applied to all screens. Refer to the Notes column for information on which specific updates were applied to a screen.

Screens affected in Project Budgeting » Top Level (All Projects) Reports:

Screen	Notes
Direct Project Cost Categories	All updates were applied.
Direct Project Cost	All updates were applied.
Labor Hours Analysis	All updates were applied.
Labor Cost Analysis	All updates were applied.
Budget/EAC Status	Instead of the Source column, the Version column displays the version number and version code of a budget.

Screens affected in Project Budgeting » Level Down Reports:

Screen	Notes
Project Cost Categories	All updates were applied.
Project Cost	All updates were applied.
Level Down Projects Future Revenue	Instead of the Source column, the Version column displays the version number and version code of a budget.

Screens affected in **Project Budgeting » Supplemental Reports**:

Screen	Notes
Project Budgets/EACs Status	This screen was updated to use only the final version of a budget / EAC. No other UI changes were applied.
Project Status	No updates mentioned above were applied to this screen. Three new fields, Budget Type , Version Number , and Version Code , have been added to the Header subtask on this screen to display the type, version number, and version code of a project budget/EAC. The Budget ITD column on the Summary Detail subtask has been changed to Budget/EAC ITD .

Screens in the Active Level Reports application group have also been updated to use the final version of a project budget/EAC when you select **Budget** or **Variance** as the **Report Type** and you select **Budget** or **EAC** as the **Budget Type**.

In some screens, the **What If** option is now included in the **Report Type** group box, and the **Comparisons** group box that contains the **Compare** and **with** fields has been added. For example:

Select the **What If** option if you want to compare the actual cost of a project to a budget/EAC version, or to compare one budget/EAC version to another version. If you select **What If**, the fields under **Comparisons** are enabled, and the versions you want to compare display on the subtasks.

In the **Compare** and **with** fields, enter, or click  to select, the actual cost or the budget/EAC of a project that you want to compare.

The **Source** column displays on the subtasks of a report screen and displays the version number and version code of a budget/EAC if:

- The **Report Type** is **Variance**.
- The **Report Type** is **Budget** and you select the **Combined** check box for a result set.
- The **Report Type** is **What If**.

Note, however, that not all updates were applied to all screens. Refer to the Notes column for information on which specific updates were applied to a screen.

Screens affected in **Project Budgeting » Active Level Reports**:

Screen	Notes
Hours Breakdown	All updates were applied.
Raw Cost Breakdown	All updates were applied.
Burdened Cost Breakdown	All updates were applied.
All Cost Breakdown	All updates were applied.
T&M Billable Revenue Breakdown	This screen was updated to use only the final version of a budget / EAC. No other UI changes were applied.
T&M Labor Analysis	All updates were applied, but instead of the Source column, the Description column displays the version number and version code of a budget.
T&M Budget Review	This screen was updated to use only the final version of a budget / EAC. No other UI changes were applied.
Revenue Breakdown	This screen was updated to use only the final version of a budget / EAC. No other UI changes were applied.
Current Forecast	This screen was updated to use only the final version of a budget / EAC. No other UI changes were applied.
Revenue Analysis	This screen was updated to use only the final version of a budget / EAC. No other UI changes were applied.

Related Updates in Costpoint Projects

Since the Manage User-Defined Information screen and the User-Defined Info subtask that have been added in Costpoint Planning are based on the same screens in the Projects domain, you can enter user-defined information in **Projects » Project Setup » Project Master » Manage User-Defined Information** or on the User-Defined Info subtask in **Projects » Project Setup » Project Master » Manage Project User Flow**. These records will then become available for use in **New Business Budgeting » Controls and Utilities » Manage User-Defined Information** and on the User-Defined Info subtask in **New Business Budgeting » Actions/Processing » New Business Budgets**.

However, if you enter new user-defined information in Manage User-Defined Information and on the User-Defined Info subtask in New Business Budgets in Costpoint Planning and the new business has the same ID as a project in the Projects domain, the user-defined information you entered for the new business will not be displayed and will not be usable in the Projects domain.

This update is done to ensure that no existing project will be modified when you enter new user-defined information in Costpoint Planning.

Resource Planning Task Reassignment and Rescheduling

The Budget By Resource application was 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.

This functionality was implemented through the addition of a new Assignment Actions dialog box, which is accessible after you:

1. Open the resource record in the Budget Resource Planning application.
2. Select the record in the **Selected Resources** table, and select the resource.
3. Click **Add/Edit/Delete Assignments**.
4. Select the row that contains the hours you want to reschedule or reassign.
5. Click **Action** in the **Reassign Reschedule** column.

In the Assignment Actions dialog box, use the Reschedule tab to change the assignment dates for the selected resource, and use the Reassign tab to assign the hours to a different resource.

In the Reschedule tab, you can only enter the new dates in the **Reschedule Start Date**. The Reschedule End Date is calculated using the same period of time in the original assignment dates. If you move the reschedule start date a year forward, the reschedule end date will also move a year forward.

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After entering the new dates, click **Reschedule** to change the assignment dates.

Assignment Actions

Resource Type: Employee Type: BUD Work Type:
 Resource ID: ASAKA Project ID: 0414 Version No: 1 Commit

Reschedule Reassign

Assignment Start Date: 01/01/2010 Assignment End Date: 05/01/2019
 Reschedule Start Date: 01/01/2010 Reschedule End Date: 05/01/2019
 Reschedule

Enter the new dates.

End Dates are computed by the system. If the end date is outside the period of performance, a warning message displays.

Click Reschedule.

If Commit is selected, then the budgets will also be committed; otherwise, a 'Working' version will be created.

Click the Reassign tab to assign the budgeted hours to a different resource. You can only select the same Resource Type as the current selection. If the current assignment is to an Employee, then only Employees can be selected in the **Resource Type**.

Assignment Actions

Resource Type: Employee Type: BUD Work Type:
 Resource ID: ASAKA Project ID: 0414 Version No: 1 Commit

Reschedule Reassign

Reassign Period: Entire Assignment Period Reassign End Date: 05/01/2019
 Reassign by % Reassign by hours Maximum Hours
 Resource Type: -None- Resource ID:
 Reassign

From the Reassign Period drop-down list, select the assignment period.

Set the start and end dates if you selected Date Range under Reassign Period.

Click Reassign.

If Commit is selected, then the budgets will also be committed; otherwise, a 'Working' version will be created.

Reassign the workload by percentage or by specific number of hours.

Select the resource to which you want to reassign the hours.

To view the existing assignment of the selected resource, click the **Current Assignments** subtask.

Current Assignments					Query				
Type	ID	Work Type	Project Name		02/01-02/29*20 (160/160)	03/01-03/31*20 (176/176)	04/01-04/30*20 (176/176)	05/01-05/31*20 (160/168)	06/01-06/30*20 (168/176)
Project	GADMIN.00.120		Human Resources		0.00	0.00	0.00	0.00	0.00
Project	ALLYX.00.01.03		Control: Weight Analysis		0.00	0.00	0.00	0.00	0.00
New Business	EACLEX01	Proposal			35.00	35.00	35.00	35.00	35.00
New Business	EACLEX01	Proposal			88.00	88.00	88.00	88.00	88.00
New Business	LXTEST0626	Proposal			35.00	35.00	35.00	35.00	35.00
New Business	LXTEST0626	Proposal			88.00	88.00	88.00	88.00	88.00
Assignment Total					246.00	246.00	246.00	246.00	246.00
Available Hours					160.00	176.00	176.00	160.00	168.00
Remaining Hours					-86.00	-70.00	-70.00	-86.00	-78.00

For more information on the Reschedule/Reassign functionality, see the online help for this application. Click **Planning » Resource Planning » Budget Resource Planning**.

Update to Excel Uploads

Previously, the Excel upload option found in the **Import Budget/EACs from Excel** and **Import New Business Budgets from Excel** applications used an **Upload File** button which cannot be used with Web Services.

For this release, the **Upload File** action button and the **Error Report & Upload Report** subtasks were removed to adhere to web services requirement and further improve the Excel upload process.

A **Parameter ID** was added to the form so you can set the criteria and use it to retrieve a previously saved parameter ID which represents a set of screen selection parameters. You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency.

You need to click the **Validate Input File** option from the Process/Gear toolbar to review the budget before uploading it. An error report will be generated which you can use as a guide to correct your original entries in the Excel template,

For more details, see the Costpoint Planning help topic on *Import Budget/EACs from Excel Process Overview* and *Import New Business Budgets from Excel Process Overview*.

Other Updates to New Business Budgeting

Employee Schedule Subtask

New Business Budgeting was 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. To display the employee schedule subtask, click **Planning » New Business Budgeting » Actions/Processing » New Business Budgets**, and then click the **Hours** subtask.

Note: The Employee Schedule subtask only displays if the New Business Budget has a Working status. For subcontractor hours and consulting hours, only total available hours by period are displayed without the deduction of scheduled hours.

Multi-New Business Budget Consolidation (Revenue/Cost)

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

Use this application 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 have selected.

Grouping Description

You can now name the group of New Business Budgets that you have selected and save it for future use.

Enter the group description in the **Grouping Description** field and click **Save Group** to save the group description for future lookup to review the same grouping.

When you return to this application, you can search the group name and select the group. Use the lookup in the **Grouping Description** field to find the group and click **Select Group** to populate the result set. The result set will display all New Business Budgets, but those in the group will be highlighted by row. You can select additional New Business Budgets and add them to the Group by clicking **Save Group**.

Click **Delete Group** to remove the group from the Grouping Description selection.

All Cost Breakdown Subtask

After you have selected your budgets, click the **All Cost Breakdown** subtask to review the summarized cost categories. You can drill down to find the GL accounts and which New Business Budget the data is coming from. All periods in the budgeted start and end dates are also displayed.

To access the Multi-New Business Budget Consolidation (Revenue/Cost) application, click **Planning » New Business Budgeting » Reports/Inquiries » Multi-New Business Budget Consolidation (Revenue/Cost)**.

Structured New Business Budget Summary (Revenue/Cost)

Structured Proposal Summary (Rev/Cost) was renamed to Structured New Business Budget Summary (Revenue/Cost), and it was also updated with additional functionality.

Use this application 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, are displayed. Hours and Amounts in the New Business Budgets display in the Structured New Business Budget Summary as amounts.

All Cost Breakdown Subtask

Use the All Cost Breakdown subtask to view summary rows by cost category, description, and total budget with the ability to drill down to the G/L Account and resource.

To access the Structured New Business Budget Summary (Revenue/Cost) application, click **Planning » New Business Budgeting » Reports/Inquiries » Structured New Business Budget Summary (Revenue/Cost)**.

Project Budgeting Usability Improvements

This section describes multiple enhancements made to areas within Project Budgeting. These enhancements were implemented to improve general usability.

Delete Historical EACs

The Delete Historic Project EACs screen has been added in **Planning » Administration » Administration Utilities**. Use this screen to simultaneously delete multiple versions of project EACs.

This screen only deletes approved, complete, and incomplete EAC versions that are not marked as final.

You can choose between two methods of deleting historic EAC versions:

- **Delete by Version:** Select this option to delete the earlier versions of project EACs. If you select this option, historic EAC versions under all organizations and projects will be deleted, and you must enter the number of most recent EAC versions you want to keep in the **Keep the latest ___ EAC versions, delete prior versions** field. For example, if you enter 2, Costpoint will keep the two most recent versions of the EACs and will delete any prior version.
- **Delete by Date On or Before:** Select this option to delete versions of project EACs by date. You must specify if you want to delete project EAC versions based on their creation date or closed period date. If you select this option, you can select all, one, or a range of organizations or projects where you want historic EAC versions to be deleted.

Once you enter the criteria for deletion, you can view the EACs to be deleted on the Preview subtask.

You can run this screen any time or enter parameters for it to run on a scheduled time using the Costpoint Job Management applications.

Hide Historic Project Budgets/EACs

The Configuration Settings and Project Budgets / EACs screens have been updated to allow you to hide historic versions of project budgets/EACs.

Configuration Settings


The **Enable Project “Hide Bud/EAC”** check box has been added to the Project tab on the Configuration Settings screen. Select this check box to enable the hiding of historic project budget or EAC versions on the Project Budgets / EACs screen.

Project Budgets / EACs

The following have been added to the Project Budgets / EACs screen:

- **Hide Bud/EAC** column
- **Hide** button
- **Unhide** button

These only display if the **Enable Project “Hide Bud/EAC”** check box is selected on the Configuration Settings screen.

To hide a budget or EAC version, select the **Hide Bud/EAC** check box for that record and click **Hide** to hide the record immediately. Otherwise, if you don't click **Hide**, those records that have their **Hide Bud/EAC** check box selected will be hidden when you click .

Note that you can only hide approved project budget/EAC versions that are not marked as final.

To view hidden records, click **Unhide**. When hidden records display, their **Hide Bud/EAC** check box will still be selected. You can then clear the **Hide Bud/EAC** check box if you want that record to remain unhidden when you reopen the Project Budgets / EACs screen.

Only Show Projects with Budgets/EACs

The Configuration Settings and Project Budgets / EACs screens have been updated to allow you to only display projects that have existing budgets/EACs.

Configuration Settings

The **Show Budget/EAC Only Default** check box has been added to the Project tab on the Configuration Settings screen. Select this check box to display, by default, only the projects that have an existing budget/EAC when you open the Project Budgets / EACs screen. Otherwise, clear this check box to display all projects.

Project Budgets / EACs

The **Show Budget/EAC Only** check box has been added to the Project Budgets / EACs screen. Use this to override the default setting in Configuration Settings. If **Show Budget/EAC Only Default** is selected in Configuration Settings, the **Show Budget/EAC Only** check box is also selected by default, and only projects with an existing budget/EAC display on the screen. You can clear the check box to display all projects.

In contrast, if **Show Budget/EAC Only Default** is cleared in Configuration Settings, the **Show Budget/EAC Only** check box is cleared by default as well, and all projects display. Select the check box to display projects that have an existing budget/EAC.

Hide Budget Data Entry Rows

The Configuration Settings and Project Budgets / EACs screens have been updated to allow you to hide budget/EAC rows on data entry subtasks on the Project Budgets / EACs screen.

Configuration Settings

The **Check the Project Budget "Enable Subtask Row Hide" option by default** check box has been added to the Project tab on the Configuration Settings screen. Select this check box to enable, by default, the ability to hide project budget or EAC rows on data entry subtasks on the Project Budgets / EACs screen. Otherwise, clear this check box to display all budget/EAC rows.

Project Budgets / EACs

The **Enable Subtask Row Hide** check box has been added to the Project Budgets / EACs screen.

Use this to override the default setting in Configuration Settings. If **Project Budget "Enable Subtask Row Hide" option by default** is selected in Configuration Settings, the **Enable Subtask Row Hide** check box is also selected by default. You can clear it to display all project budget/EAC resources.


In contrast, if **Project Budget "Enable Subtask Row Hide" option by default** is cleared in Configuration Settings, the **Enable Subtask Row Hide** check box is cleared by default as well. Select it to hide the resources assigned to a budget or EAC.

Note that you can only hide rows assigned to project budget/EAC versions that have a **Working** status.

A new column, **Hide Row**, and the **Hide** and **Unhide** buttons have been added to the following subtasks on the Project Budgets / EACs screen:

- Staff Hours
- Staff Escalation
- Materials
- Subcontractor
- Material Handling
- Travel
- Consultant
- Other Direct Costs
- Subcontractor Hours
- Consultant Hours

The **Hide Row** column and the **Hide** and **Unhide** buttons only display if you select the **Enable Subtask Row Hide** check box.

To hide a budget or EAC resource, select the **Hide Row** check box for that record and click **Hide** to hide the record immediately. Otherwise, if you don't click **Hide**, those records that have their **Hide Row** check box selected will be hidden when you click .

To view hidden records, click **Unhide**. When hidden records display, their **Hide Row** check box will still be selected. You can then clear the **Hide Row** check box if you want that record to remain unhidden when you reopen the Project Budgets / EACs screen.

New Percent Complete Revenue Calculation

Project Budgeting now includes a new percent complete revenue calculation that can determine forecasted revenue for projects with revenue formulas of EAC, ETC, or % complete.

Note: See “[Glossary of Terms](#)” below for definitions of all acronyms used in these release notes.

Calculation Method

For the formula to work, you will need to enter all project costs across a period of performance. It can be used for budgets or EACs, and can be based off either the Contract Value or Funded Value.

For budgets without EACs, the revenue calculation is:

1. Budgeted Costs including Burden for each Budgeted period CTD / Total Budgeted Costs with Burden [Estimate At Completion] = % complete for each FY/Pds.
2. The % complete x Total Contract Value* = Revenue Budget to Date.
3. Revenue Budget to Date less previous period Revenue Budget to Date = Current Period Revenue.

*Substitute Funded Value as appropriate.

For budgets with EACs, the revenue calculation is:

1. (Total Planning EAC [actual] Costs CTD + Budgeted Costs including Burden for each Budgeted period CTD) / (Total Budget EAC costs [actuals] + future period Budgeted Costs including Burden [ETC]) = % complete for each future FY/Pds.
2. The % complete x Total Contract Value = Revenue Budget to Date.
3. Revenue Budget to Date less previous period Revenue Budget to Date = Current Period Revenue.

*Substitute Funded Value as appropriate.

For example, in reports and report subtasks that show the Burdened Cost and All Periods, the calculation would be as follows by period:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	Contract Value Times Percent Complete																								
2	Example has Contract of one year, 2020																								
3																									
4	FY 2020																								Total
5	Period	1	CTD	2	CTD	3	CTD	4	CTD	5	CTD	6	CTD	7	CTD	8	CTD	9	CTD	10	CTD	11	CTD	12	CTD
6																									
7																									
8	Burdened Costs	5000	5000	15000	20000	3000	23000	5500	28500	7000	35500	5000	40500	6000	46500	8000	54500	2500	57000	4500	61500	5000	66500	9000	75500
9																									
10	Percent Complete	7%		26%		30%		38%		47%		54%		62%		72%		75%		81%		88%		100%	
11		B8/Y8		E8/Y8		G8/Y8		I8/Y8		K8/Y8		M8/Y8		O8/Y8		Q8/Y8		S8/Y8		U8/Y8		W8/Y8		X8/Y8	
12																									
13	Rev	132,450	397,351	529,801	79,470	609,272	145,695	754,967	185,430	940,397	132,450	1,072,848	158,940	1,231,788	211,921	1,443,709	66,225	1,509,934	119,205	1,629,139	132,450	1,761,589	238,411	2,000,000	
14		B16*G10	E13-C13	B16*F10	G13-F13	B16*G10	I13-G13	B16*H10	K13-I13	B16*K10	M13-K13	B16*M10	O13-M13	B16*O10	Q13-O13	B16*Q10	S13-Q13	B16*S10	U13-S13	B16*U10	W13-U13	B16*W10	Y13-W13	B16*Y10	
15																									
16																									
17																									
18	Value	2,000,000																							
19																									
20																									
21																									
22	Legend:																								
23	A) (Budgeted Costs including Burden for each Budgeted period CTD) / Total Project Budgeted Costs = % complete for each future FY/Pds.																								
24	B) The % percent complete x Total Contract Value = Revenue Project Budget to Date.																								
25	C) Revenue Project to Date less previous period Revenue Project to Date = Current Period Revenue.																								

Affected Reports

The results of the revenue formula can be viewed in the following reports:

- **Project Budgeting » Level Down Reports » Level Down Projects Future Revenue » Revenue Breakdown**
- **Project Budgeting » Active Level Reports:**

- Current Forecast
- Revenue Breakdown
- Revenue Analysis

Glossary of Terms

The table below defines each of the acronyms used in the formula descriptions above.

Acronym	Definition
CTD	This stands for Costs Contract to Date.
ETC	This stands for Costs Estimate to Completion. It is the total of budgeted costs in future periods.
EAC	<p>This stands for Costs Estimate at Completion.</p> <p>An EAC is a planning forecast.</p> <p>It is the total of all budget costs or combination of past actual costs plus future budget period costs when using the Planning EACs</p>

Employee Labor Rates

Employee Labor Rates are now displayed in Project Budgeting, New Business Budgets, and Resource Planning. You can now view the Hr Rate or the hourly labor rate of the employee based on the current period of the budget. The Hr Rate column can be found under the Staff Escalation subtask, Staff Hours subtask, and Add/Edit/Delete Assignment subtask.

A new field was added to the Project tab of Configuration Settings so you have the option to set the Hr Rate to display or not.

Field	Description	Notes/Choices	Decision/Admin Instructions
If Labor Suppression is off, do you want to show Employee Labor Rate Planning?	<p>This field controls whether the Hr Rate of the employee will be displayed or not when Labor suppression is set to OFF.</p> <p>Note: By default, the Hr Rate is displayed when Labor Suppression in Manage Users is set to OFF. When Labor Suppression is set to ON the Hr Rate is not displayed.</p>	<p>Select Yes to display the Hr Rate even if Labor Suppression is set to OFF, or select No to hide the Hr Rate when Labor Suppression is set to OFF.</p>	<p>Yes or No</p> <p>To change this setting, click Planning » Administration » System Security » Manage Users.</p>

Ability to Upload from Excel Removed

As part of the Project Budgeting usability enhancement, the ability to Import from Microsoft Excel was removed from the **Import Budget/EAC from Scheduling App**.

All options and references related to uploading from MS Excel were excluded from the screen.

You can now directly upload from MS Excel using the Import Budget/EACs from Excel screen and no longer need to go to the Import Budget/EAC from Scheduling App.

People/Regulatory

This section describes Costpoint 8.0 enhancements for the People domain and Regulatory updates.

Support for Life/Supplemental Life Guaranteed Issue and Evidence of Insurability

Life, accidental death and dismemberment (AD&D), disability and supplemental insurance plans often cover individuals only up to a specific amount (guaranteed issue amount) unless the covered individual provides Evidence of Insurability (EOI). An EOI is normally a health questionnaire that insurance companies use to verify if a person meets the definition of good health.

This Costpoint enhancement provides you with the following:

- Tracking of coverage options that need EOI based on user-defined criteria
- Tracking of the status of the employee's EOI approval
- Ability to view all EOIs for an employee or an employee's spouse

The Manage Benefit Plans screen now has a flag to indicate if an EOI is required. If it is required, the application enables a separate EOI tab with EOI criteria and supporting fields. The benefit election will have an EOI status field that will show either:

- Not Required
- Required
- Denied
- Approved

On the Activate Pending Benefit Elections screen, if a missing election benefit plan requires an EOI or the new election EOI status is **Required**, **Denied** or **Approved**, the application will insert that coverage option into a new application, Manage Employee Evidence of Insurability (EOI).

Note: New elections that have an EOI status of **Not Required** are also transferred to the Manage Employee Evidence of Insurability (EOI) screen to keep track of all EOI transactions.

If the employee's new election EOI Status is **Denied**, **Required** or **Approved**, the application implements the substitution rule selected on the Manage Benefit Plans screen. The rule will be one of the following:

- Extend the employee's original election.
- Assign no coverage.
- Assign a coverage option with the highest coverage amount not requiring an EOI.

Note: For elections with **Approved** EOI statuses, the rule is applied only from the coverage start date until the EOI approval date.

For a new election with an **Approved** EOI Status, the substitution will be applied only when **EOI Received Date** is after the coverage start date. This only applies to elections with **Life Event** as the **Enrollment Method**.

The intention of extending the original election is to ensure that the employee or their spouse is covered with their previous insurance until such time as the EOI is approved and their new insurance can take effect. The new coverage will start when the EOI is approved, and this will not be retroactive.

Costpoint also provides you with a new process, Process Employee EOI Benefit Elections, which will end the original coverage option and activate the employee's initially selected coverage option with a start date of the EOI approval. This new process also applies the substitution rules from the Manage Benefit Plans screen on elections with EOI that has not been approved.

Other additional Costpoint changes for this enhancement include the following

- The Life Events/New Hires screen and Benefits Enrollment screen in Costpoint Employee Self Service (ESS) display the **EOI Status** and **EOI Form URL/Location** for the following Benefit Types:
 - Life Insurance
 - AD&D Insurance
 - Long Term Disability
 - Short Term Disability
 - Supplemental Life Insurance
 - Supplemental AD&D Insurance
 - Spouse Life Insurance
 - Spouse AD&D Insurance
- Coverage Amounts will be added to the Employee ESS Elections and Employee Life Event Elections tables and saved during those processes in ESS for those same applications listed above.
- Coverage Amounts will be added on the Manage Employee Evidence of Insurability (EOI) screen in order to be able to easily compare the coverage amounts from year to year. It will only be visible in Manage Employee Evidence of Insurability (EOI).

Attention: For more information on the EOI functionality in Costpoint, please refer to the [Costpoint Evidence of Insurability Quick Steps](#).

Manage Benefit Plans (HBMBPSET)

The Coverage Options subtask provides the following new fields:

Field	Description
Coverage Limit	<p>Enter the coverage limit for the plan. If this field is enabled, the application automatically sets the value in this field to 999,999,999,999.00.</p> <p>This field is enabled if the Coverage Calculation Method is Factor or Coverage Table; Coverage Table is Salary; and the System Benefit Type is one of the following:</p> <ul style="list-style-type: none"> ▪ Life Insurance ▪ AD&D Insurance ▪ Long Term Disability ▪ Short Term Disability ▪ Supplemental Life Insurance

Field	Description
	<ul style="list-style-type: none"> Supplemental AD&D Insurance Dependent Life Insurance Spouse Life Insurance Spouse AD&D Insurance Other <p>You can update the Coverage Limit if needed.</p> <p>This field is disabled if the Coverage Calculation Method is Amount or Coverage Table and the Coverage Table is Age. When this is disabled, the value is set to 999,999,999,999,999.00.</p>

The Enrollment/Coverage Rules tab provides the following new/updated fields:

Field	Description
Require HR Approval in ESS	<p>This existing field was previously labeled as “Requires Approval.”</p> <p>Select this check box if the plan requires approval before it is effective.</p>
Evidence of Insurability Required	<p>Select this check box if Evidence of Insurability is needed for the benefit plan.</p> <p>If you select this check box, use the EOI Rules tab to specify the following:</p> <ul style="list-style-type: none"> Conditions which will require the employee or his/her spouse to provide Evidence of Insurability Steps that should occur if the employee or spouse is denied coverage or is pending coverage <p>If you select this check box for a benefit plan, you will not be able to assign the plan to an employee on the Manage Employee Benefit Elections table. Instead, you will have to enter a record into the Manage Employee Evidence of Insurability (EOI) screen, which determines if the employee’s calculated coverage amount requires evidence of insurability (EOI) and, if so, you will be able to approve or deny the coverage amount.</p> <div style="border: 1px solid blue; padding: 5px; margin: 10px 0;"> <p>Note: If this check box is selected but the coverage option is NO CVG (no coverage), it should be assigned to the employee on the Manage Employee Benefit Elections screen. The NO CVG coverage option cannot be assigned on the Manage Employee Evidence of Insurability (EOI) screen.</p> </div> <p>In cases of denial or pending coverage, the Substitution Rules you specify on the EOI Rules tab of the Manage Benefit Plans screen will be used to determine the coverage amount, if any, for which the employee is eligible.</p> <p>This check box is only available if the System Benefit Type is one of the following:</p> <ul style="list-style-type: none"> Life Insurance

Field	Description
	<ul style="list-style-type: none"> AD&D Insurance Long Term Disability Short Term Disability Supplemental Life Insurance Supplemental AD&D Insurance Spouse Life Insurance Spouse AD&D Insurance

The EOI Rules tab provides the following new fields:

Field	Description
New Employee/New Benefit Plan group box	<p>The rules in this group box apply to new employees that elect the benefit plan. If the elected coverage amount exceeds the specified threshold amount, EOI will be required for the employee, or spouse for spousal coverage.</p> <p>An employee is considered “new” if both the following are true:</p> <ul style="list-style-type: none"> The start date of the new coverage is before or the same as the employee’s new hire period. The new hire period is based on the employee’s Current Hire Date from the Manage Employee Information screen and the Number of days that employees are classified as new employees value on the Configure Benefit Settings screen- The employee does not have a record on the Employee Benefits Elections table where: <ul style="list-style-type: none"> The end date is after or the same as the employee’s Current Hire Date on the Manage Employee Information screen. The coverage option code is not NO CVG. <p>This group box contains the following fields:</p> <ul style="list-style-type: none"> Over the guarantee issue limit of: Select this check box to require EOI if a new or rehired employee elects the benefit plan for the first time and the coverage amount is over the guarantee issue limit you specify. Guarantee Issue Limit Amount: Enter the guarantee issue limit to be used as a threshold for requiring EOI for new employees electing a new benefit plan. If the coverage amount is less than or equal to the guarantee issue limit, the EOI will not be required. If the coverage amount is greater than the guarantee issue limit, EOI will be required.
Existing Employee/New Benefit Plan group box	<p>The rules in this group box apply to existing employees that elect the benefit plan for the first time or re-elect the benefit plan after a break in coverage. If the elected coverage amount exceeds any of the selected threshold amounts, EOI will be required for the employee (or spouse for spousal coverage).</p> <p>An employee is considered as “existing” if either of the following are true:</p> <ul style="list-style-type: none"> The start date of the new coverage is after the employee’s new hire period. The new hire period is based on the employee’s Current Hire Date from the Manage Employee Information screen and the Number

Field	Description
	<p>of days that employees are classified as new employees value on the Configure Benefit Settings screen.</p> <ul style="list-style-type: none"> The employee does have a record on the Employee Benefit Elections table where: <ul style="list-style-type: none"> The end date is after or the same as the employee's Current Hire Date on the Manage Employee Information screen. The coverage option code is not NO CVG. <p>This group box contains the following fields:</p> <ul style="list-style-type: none"> Any amount: Select this check box to require EOI when: <ul style="list-style-type: none"> An existing employee elects the benefit plan for the first time. An existing employee elects the benefit plan after a break in coverage. <p>EOI will be required regardless of the coverage amount elected.</p> <p>If you select this check box, the other Existing Employee/New Benefit Plan check box options become cleared and disabled.</p> Over the guarantee issue limit of: Select this check box to require EOI when an existing employee elects the benefit plan for the first time or after a break in coverage and the coverage amount is greater than the guarantee issue limit. <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: Even if EOI is not required based on the guarantee issue limit, it may be required based on the other Existing Employee/New Benefit Plan EOI requirement rules.</p> </div> Guarantee Issue Limit Amount: Enter the guarantee issue limit to be used as a threshold for requiring EOI for existing employees electing this benefit plan for the first time or after a break in coverage. If the coverage amount is less than or equal to the guarantee issue limit, EOI will not be required. If the coverage amount is greater than the guarantee issue limit, EOI will be required. Greater than the employee's salary multiplied by a factor of: Select this check box to require EOI when an existing employee elects the benefit plan for the first time or after a break in coverage and the coverage amount is greater than the product of the employee's annual salary multiplied by a factor. <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: Even if EOI is not required based on the Salary multiple, it may be required based on the other Existing Employee/New Benefit Plan EOI requirement rules.</p> </div> Factor: Enter the factor by which the employee's annual salary is multiplied to determine the amount which will trigger the need for EOI.

Field	Description
Existing Employee/Same Benefit Plan group box	<p>The rules in this group box apply to existing employees that are currently covered by the benefit plan but opt to change their coverage amount.</p> <p>An employee is considered as “existing” if either of the following are true:</p> <ul style="list-style-type: none"> ▪ The start date of the new coverage is after the employee’s new hire period. The new hire period is based on the employee’s Current Hire Date from the Manage Employee Information screen and the Number of days that employees are classified as new employees value on the Configure Benefit Settings screen. ▪ The employee does have a record on the Employee Benefit Elections table where: <ul style="list-style-type: none"> ▪ The end date is after or the same as the employee’s Current Hire Date on the Manage Employee Information screen. ▪ The coverage option code is not NO CVG. <p>This group box contains the following fields:</p> <ul style="list-style-type: none"> ▪ Increased by any amount: Select this check box to require EOI for the employee, or spouse for spousal coverage, when an existing employee is already covered by the benefit plan but increases the coverage amount. EOI will not be required if the employee re-elects the same benefit plan and coverage amount. <p>If this check box is selected, the other options in the Existing Employee/Same Benefit Plan group box becomes cleared and disabled.</p> <ul style="list-style-type: none"> ▪ Increased by the following amount: Select this check box to require EOI when an existing employee elects the same benefit plan and the coverage amount increase is greater than the increase limit you specify. <p>For example, you have the following setup:</p> <ul style="list-style-type: none"> ▪ You specify an increase amount threshold of 10,000. ▪ The employee currently has Supplemental Life Insurance coverage of \$200,000. ▪ The employee elects a coverage amount of \$215,000 during open enrollment. <p>In this scenario, the EOI would be required because the increase in coverage (15,000) exceeds the 10,000 threshold.</p> <p>Note: Even if EOI is not required based on the coverage increase limit, it may be required based on the other Existing Employee/Same Benefit Plan EOI requirement rules.</p> <ul style="list-style-type: none"> ▪ Increased by Amount: Enter the coverage amount increment that will require the need for EOI. EOI will be required if an existing employee elects to increase the coverage amount and the increase amount is greater than the amount you specify.

Field	Description
	<ul style="list-style-type: none"> ▪ Over the guarantee issue limit of: Select this check box to require EOI when an existing employee elects the same benefit plan and the coverage amount is greater than the guarantee issue limit. Note: Even if EOI is not required based on the guarantee issue limit, it may be required based on the other Existing Employee/Same Benefit Plan EOI requirement rules. When you select this check box, the employee requires an EOI if the employee currently has this coverage and the coverage amount is over the specified limit. ▪ Guarantee Issue Limit Amount: Enter the guarantee issue limit to be used as a threshold for requiring EOI for existing employees that re-elect this benefit plan and increase the coverage to an amount that is over the guarantee issue limit. If the new coverage amount is less than or equal to the guarantee issue limit, EOI will not be required. If the coverage amount is greater than the guarantee issue limit, EOI will be required. ▪ Greater than the employee's salary multiplied by a factor of: Select this check box to require EOI when an existing employee elects the same Benefit Plan but increases the coverage to an amount that is greater than the product of the employee's annual salary multiplied by a factor. Note: Even if EOI is not required based on the Salary multiple, it may be required based on the other Existing Employee/Same Benefit Plan EOI requirement rules. ▪ Factor: Enter the factor by which the employee's salary is multiplied to determine the amount which will trigger the need for EOI.
Substitution Rules group box	<p>Select the substitution rule you would like to apply if the employee elects a new or same benefit plan with a coverage amount requires EOI, but the EOI is still pending or was denied.</p> <p>If EOI Status is Required, Denied Or Approved, substitute coverage as follows:</p> <ul style="list-style-type: none"> ▪ New Benefit Plan: Select the substitution rule if you elected a new benefit plan. The options are: <ul style="list-style-type: none"> ▪ Highest coverage amount without requiring an EOI: Select this option to assign an employee the highest coverage amount which does not require EOI when you run the Activate Pending Benefit Elections or Process Employee EOI Benefit Elections application. Any existing coverage for that period will be deleted/ended. ▪ No coverage: If you select this option and a coverage option of NO CVG exists for the Benefit Plan, the application assigns a NO CVG coverage option to the employee. Otherwise, if NO CVG coverage option does not exist for the benefit plan, the employee will have no election row generated in Manage Employee Benefit Elections for the coverage period. Any existing coverage for that period will be deleted/ended.

Field	Description
	<ul style="list-style-type: none"> ▪ Same Benefit Plan: Select the substitution rule for if you elected the same benefit plans. The options are: <ul style="list-style-type: none"> ▪ Highest coverage amount without requiring an EOI: Select this option to assign an employee the highest coverage amount which does not require EOI when you run the Activate Pending Benefit Elections or Process Employee EOI Benefit Elections application. Any existing coverage for that period will be deleted/ended. ▪ Extend the current coverage option: Select this option to extend the employee's existing coverage option to the end of the coverage period. ▪ No coverage: If you select this option and a coverage option of NO CVG exists for the Benefit Plan, the application assigns a NO CVG coverage option to the employee. Otherwise, if NO CVG does not exist for the benefit plan, the employee will have no election row generated in Manage Employee Benefit Elections for the coverage period. Any existing coverage for that period will be deleted/ended.
EOI Form URL/Location (data field)	Enter the URL or network file location for the EOI form that the user must fill out. This field is only available if the Evidence of Insurability Required check box is selected on the Enrollment/Coverage Rules tab of this screen.

Manage Employee Evidence of Insurability (EOI) (EMMEEOI)

Use the Manage Employee Evidence of Insurability (EOI) screen to view or change the EOI status of employees' coverage options.

This application will be updated through Activate Pending Benefit Elections (AOPESSUE).


You can add records in this application for benefit plans that may require an EOI. You can also change the EOI status and add an EOI date and EOI document location.





Note: When you add records for spousal coverage, you can enter one record for the employee with the spousal coverage option and the dependent ID. Costpoint will automatically add the **DEP CVG** option for the employee after you run the Process Employee EOI Benefit Elections (EOI) application.


When the EOI is approved for employee/spousal coverage, use the Process Employee EOI Benefit Elections screen to add the benefit elections to their respective tables: Employee benefit election will be added to the Manage Employee Benefit Elections screen, and the spousal benefit elections will be added to the Assign Dependents to Benefit Plans screen.

To access this new screen, click **People » Employee » Employee Benefit Information » Manage Employee Evidence of Insurability (EOI)**.

The screen provides the following fields.

Field	Description
Employee	Enter, or click  to select, the ID of the employee that elected coverage.
Employee Name	This field displays the employee's last and first names.

Field	Description
Taxable Entity	This field displays the taxable entity for the employee.
Record Source	<p>This field displays the screen where the record was created and can be either of the following:</p> <ul style="list-style-type: none"> ▪ Activate Pending Benefit Elections ▪ Manage Employee Evidence of Insurability (EOI)
Benefit Package	Enter, or click  to select, the employee's benefit package. The benefit plan and coverage option elected by the employee must be assigned to the benefit package.
Benefit Plan	<p>Enter, or click  to select, the benefit plan elected by the employee. The System Benefit Type of the benefit plan must be one of the following:</p> <ul style="list-style-type: none"> ▪ Life Insurance ▪ AD&D Insurance ▪ Long Term Disability ▪ Short Term Disability ▪ Supplemental Life Insurance ▪ Supplemental AD&D Insurance ▪ Spouse Life Insurance ▪ Spouse AD&D Insurance
Coverage Option	Enter, or click  to select, the coverage option for which the EOI is required.
Spouse	If applicable, enter, or click  to select, the spouse for which the coverage was elected. You must set up this person on the Manage Employee Dependents/Beneficiaries screen with a Relationship to Employee value of Husband or Wife .
Start Date	This field displays the start date for the coverage option.
End Date	This field displays the end date for the coverage option.
Coverage Amount	This field displays the coverage amount for the coverage option.
Coverage Limit	This field displays the monetary coverage limit of the EOI, if applicable.
Enrollment Method	<p>From the drop-down list, select the enrollment for the coverage option. Valid values are:</p> <ul style="list-style-type: none"> ▪ Open Enrollment ▪ Life Event

Field	Description
Life Event	Enter, or click  to select, the life event used for the enrollment method for the benefit election.
EOI Status	<p>From the drop-down field, select Approved or Denied as the employee's Evidence of Insurability (EOI) status.</p> <p>Valid values in this field are:</p> <ul style="list-style-type: none"> ▪ Not Required: This status indicates that the employee or spouse does not need to provide EOI before coverage can begin. If this status is assigned to the coverage, Costpoint's Process Employee EOI Benefit Elections application will assign the coverage to the employee and/or spouse. ▪ Required: This status indicates that the employee or spouse still needs to provide EOI before coverage can begin. If this status is assigned to the coverage, the Process Employee EOI Benefit Elections application will apply the following: <ul style="list-style-type: none"> ▪ The elected coverage will not be assigned to the employee and/or spouse. ▪ If the benefit plan setup has a Substitution Rule of Highest coverage amount without requiring an EOI, the coverage option with the highest coverage amount that does not require EOI will be assigned to the employee or spouse ▪ If the benefit plan has a Substitution Rule of Extend the current coverage, the employee's and/or spouse's existing coverage dates will not be altered. ▪ If the benefit plan has a Substitution Rule of No coverage, the employee's and/or spouse's existing coverage will be assigned an end date that is one day before the screen coverage start date. ▪ Approved: This status indicates that the employee or spouse provided the required EOI and is eligible for the specified coverage. If this status is assigned to the coverage, the Process Employee EOI Benefit Elections application will assign the coverage to the employee and/or spouse. ▪ Denied: This status indicates that the employee or spouse was deemed ineligible for the specified coverage. If this status is assigned to the coverage, the Process Employee EOI Benefit Elections application will not assign the coverage to the employee and/or spouse, and Costpoint will use the benefit plan's Substitution Rule to determine whether: <ul style="list-style-type: none"> ▪ The employee/spouse will be assigned the highest coverage that does not require EOI. ▪ The employee/spouse will have their coverage extended. ▪ The employee/spouse will have their existing coverage discontinued. ▪ No action will be taken.

Field	Description
EOI Received Date	Enter, or click to select, the date the EOI document was received by the Human Resources department.
EOI Document	If applicable, enter the network location and document name of for the employee's EOI.
Coverage Option Substituted because of EOI Status = Denied or Required	This display-only check box indicates whether or not the record has been processed through the Process Employee EOI Benefit Elections screen or Activate Pending Benefit Elections screen.
Benefit Election Uploaded	<p>This display-only check box indicates whether or not the employee's elected coverage option was processed through the Process Employee EOI Benefit Elections screen or the Activate Pending Benefit Elections screen and the election was assigned to the employee and/or spouse.</p> <p>If this check box is selected, it indicates one of the following:</p> <ul style="list-style-type: none"> ▪ The coverage amount elected by the employee required EOI. It was then approved and the election was uploaded to the Manage Employee Benefit Elections table. ▪ The spousal coverage amount elected by the employee required EOI. It was then approved and the election was uploaded to the Assign Dependents to Benefit Plans table ▪ The coverage amount elected by the employee did not require EOI based on the benefit plan's EOI rules. As a result, the election was uploaded to the Manage Employee Benefit Elections table. ▪ The spousal coverage amount elected by the employee did not require EOI based on the benefit plan's EOI rules. As a result, the election was uploaded to the Assign Dependents to Benefit Plans table.








Process Employee EOI Benefit Elections (EMPEEOI)



Use the Process Employee EOI Benefit Elections screen to add any benefit elections that were pending approval of the EOI to the Manage Employee Benefit Election screen and Assign Dependents to Benefit Plans screen.

To access this new screen, click **People » Employee » Employee Benefit Information » Process Employee EOI Benefit Elections**.

The following fields are available on this screen.

Field	Description
Parameter ID	Enter the ID code for saved parameter. The description of the parameter ID displays in the adjacent field.
Through Effective Date	Use the following fields to select the effective date range:

Field	Description
	<ul style="list-style-type: none"> ▪ Option: This field displays One since you can only select one effective date. ▪ Start: Enter, or click  to select, the benefit plan start date.
Taxable Entity	<p>Use the following fields to select the taxable entity range:</p> <ul style="list-style-type: none"> ▪ Option: From the drop-down list, select One or All. ▪ Start: Enter, or click  to select, the taxable entity for processing.
Employee	<p>Use the following fields to select the employee range:</p> <ul style="list-style-type: none"> ▪ Option: From the drop-down list, select the range option. Valid options are: <ul style="list-style-type: none"> ▪ One ▪ Range ▪ From Beginning ▪ To End. ▪ Start: Enter, or click  to select, the starting employee for processing. ▪ End: Enter, or click  to select, the ending employee for processing ▪ Non-Contiguous Ranges: Select this check box to enter non-contiguous range of employees in the subtask.
Benefit Plan	<p>Use the following fields to select the benefit plan range:</p> <ul style="list-style-type: none"> ▪ Option: From the drop-down list, select the range option. Valid options are: <ul style="list-style-type: none"> ▪ One ▪ Range ▪ From Beginning ▪ To End. ▪ Start: Enter, or click  to select, the benefit plan for processing. ▪ End: Enter, or click  to select, the ending benefit plan for processing.
Pay Cycle	<p>Use the following fields to select the pay cycle range:</p> <ul style="list-style-type: none"> ▪ Option: From the drop-down list, select One or All. ▪ Start: Enter, or click  to select, the pay cycle for processing.
Employee Non-Contiguous Ranges subtask	<p>If you selected the Non-Contiguous Ranges check box for the employee range, use this subtask to enter the ranges. Click New to add a range.</p> <p>The following fields are available on this subtask:</p>

Field	Description
	<ul style="list-style-type: none"> ▪ Range Type: From the drop-down list, select the range option. Valid options are: <ul style="list-style-type: none"> ▪ One ▪ Range ▪ From Beginning ▪ To End. ▪ Start: Enter, or click  to select, the starting employee for processing. ▪ End: Enter, or click  to select, the ending employee for processing.

Manage Employee Benefit Elections (HBMEBELC)

The application provides the following new fields:

Field	Description
EOI Status	<p>If applicable, this field displays the employee's Evidence of Insurability (EOI) status. Valid values are:</p> <ul style="list-style-type: none"> ▪ Not Required ▪ Approved
EOI Received Date	<p>This field displays the date that the EOI document was received by the Human Resources department.</p>
EOI Document	<p>This field displays the location where a copy of the EOI is saved.</p>

The Manage Employee Benefit Elections screen provides a new validation that prevents you from entering any benefit elections for plans that require an EOI since you must enter those elections on the Manage Employee Evidence of Insurability (EOI) screen.

Costpoint will move only the benefit elections with **Approved** and **Not Required** EOI statuses from the Manage Employee Evidence of Insurability (EOI) screen to this screen. Benefit elections with **Required** and **Denied** EOI statuses will remain on the Manage Employee Evidence of Insurability (EOI) screen.

In form view, the Benefit Elections Details is presented in the following three tabs:

- Benefit Election Details
- EOI Details
- Physician Info

Assign Dependents to Benefit Plans (HBMADEP)

The application provides the following new fields:

Field	Description
EOI Status	If applicable, this field displays the dependent's Evidence of Insurability (EOI) status. Valid values are: <ul style="list-style-type: none"> Not Required Approved
EOI Received Date	This field displays the date that the EOI document was received by the Human Resources department.
EOI Document	This field displays the location where a copy of the EOI is saved.

The Assign Dependents to Benefit Plans screen provides a new validation that prevents you from entering any benefit elections for plans that require an EOI since you must enter those elections on the Manage Employee Evidence of Insurability (EOI) screen.

Costpoint will move only the benefit elections with **Approved** and **Not Required** EOI statuses from the Manage Employee Evidence of Insurability (EOI) screen to this screen. Benefit elections with **Required** and **Denied** EOI statuses will remain on the Manage Employee Evidence of Insurability (EOI) screen.

Update Employee Package Deductions (HBPAPDED)

If applicable, the application now uses the benefit plan's **Coverage Limit** field for any coverage/premium calculations.

Update Benefit Option/Election Tables (AOPESSDB)

The Update Benefit Option/Election Tables screen features the following updates:

- A new **EOI Status** field was added to the benefit options table and benefit options report.
- The application now determines if EOI is required for the benefit plan and coverage options combination for benefits enrollment.

Life Events/New Hires (ESMLIFEEVENT)

The Life Events/New Hires screen provides new EOI fields on the Select New Coverage Level subtasks of following tabs:

- Employee Life Insurance
- Accidental Death & Dismemberment
- Long Term Disability
- Short Term Disability
- Supplemental Life Insurance
- Supplemental AD&D Insurance
- Spouse Life Insurance
- Spouse AD&D Insurance

The application now determines if EOI is required for the benefit plan and coverage options combination.

The new EOI fields are the following:

Field	Description
Evidence of Insurability	If applicable, this field displays if the coverage option requires Evidence of Insurability (EOI). Valid values are: <ul style="list-style-type: none"> Not Required Required
EOI Form Location	If applicable, this field displays the location where the employee can download or find a copy of the EOI form to fill out.

Benefits Enrollment (ESMBENENROLL)

The Benefits Enrollment screen provides new EOI fields on the Select New Coverage Level subtasks of following tabs:

- Employee Life Insurance
- Accidental Death & Dismemberment
- Long Term Disability
- Short Term Disability
- Supplemental Life Insurance
- Supplemental AD&D Insurance
- Spouse Life Insurance
- Spouse AD&D Insurance

The application now determines if EOI is required for the benefit plan and coverage options combination.


The new EOI fields are the following:

Field	Description
Evidence of Insurability	If applicable, this displays if evidence of insurability is needed for the coverage option (Not Required, Required).
EOI Form Location	If applicable, this displays the location where the employee can download or find a copy of the EOI form to fill out.


Manage Life Event Elections (AOMESSBL)

The Benefit Plan Details table provides the following new/updated fields:

Field	Description
Approved by HR	This check box is available only when the benefit plan requires approval (Require HR Approval in ESS check box is selected for the benefit plan on the Enrollment Coverage Rules tab of the Manage Benefit Plans screen). Otherwise, this check box is disabled.

Field	Description
	<p>If the benefit plan's Require HR Approval in ESS check box is selected, and your ESS Administrator approved the ESS election, this check box displays as selected. However, you can still change this setting.</p> <p>When you select this check box for the selected benefit option line and save the record, the application will select the Approved by HR check box on the Edit Dependent Elections subtask for all dependent election lines.</p>
EOI Status	<p>If applicable, this field displays the employee's Evidence of Insurability (EOI) status. You can change the option in this drop-down field with the following EOI statuses:</p> <ul style="list-style-type: none"> ▪ Not Required ▪ Approved ▪ Required ▪ Denied
EOI Received Date	<p>Enter, or click  to select, the date the EOI document was received by the Human Resources department. This is only enabled when the selected EOI status is either Approved or Denied.</p>

The Edit Dependent Elections subtask provides the following new/updated fields:

Field	Description
Approved by HR	<p>This check box is available only when the benefit plan requires approval (Require HR Approval in ESS check box is selected for the benefit plan on the Enrollment Coverage Rules tab of the Manage Benefit Plans screen). Otherwise, this check box is disabled.</p> <p>If the benefit plan's Require HR Approval in ESS check box is selected, and your ESS Administrator approved the ESS election, this check box displays as selected. However, you can still change this setting.</p> <p>When you select this check box for the selected benefit option line and save the record, the application will select the Approved by HR check box on the Edit Dependent Elections subtask for all dependent election lines.</p>
EOI Status	<p>If applicable, this field displays the dependent's Evidence of Insurability (EOI) status. You can change the option in this drop-down field with the following EOI statuses:</p> <ul style="list-style-type: none"> ▪ Not Required ▪ Approved ▪ Required ▪ Denied
EOI Received Date	<p>Enter, or click  to select, the date the EOI document was received by the Human Resources department. This is only enabled when the selected EOI status is either Approved or Denied.</p>

Note: The following applies to the Manage Life Event Elections screen:

- The **EOI Status** field and the **EOI Received Date** field on the Edit Dependent Elections subtask are always visible and disabled. They will only be editable or enabled when the benefit type is Spouse Life or Spouse AD&D only and the benefit plan's **Evidence of Insurability Required** check box is selected.
- In the Benefit Plan Details section, the **EOI Status** field and **EOI Received Date** field will not be editable. The fields will display the values of the **EOI Status** field and **EOI Received Date** field from the Edit Dependent Elections subtask when the benefit type is Spouse Life or Spouse AD&D only.

The screen also provides a new query condition which lets you search by **EOI Status** field.


Approve Open Enrollment Elections by Plan (AOMESSAP)

The main screen of the application provides the following new option:


Field	Description
All EOI Status 'Approved' Elections for Benefit Plan	Select this option to mass approve coverage elections that have an EOI status of Approved .

The Approve Employee Elections table provides the following new/updated fields:

Field	Description
Approved by HR	<p>This check box is available only when the benefit plan requires approval (Require HR Approval in ESS check box is selected for the benefit plan on the Enrollment Coverage Rules tab of the Manage Benefit Plans screen). Otherwise, this check box is disabled.</p> <p>If the benefit plan's Require HR Approval in ESS check box is selected, and your ESS Administrator approved the ESS election, this check box displays as selected. However, you can still change this setting.</p> <p>When you select this check box for the selected benefit option line and save the record, the application will select the Approved by HR check box on the Approve Dependent Elections subtask for all dependent election lines.</p>
EOI Status	<p>If applicable, this field displays the employee's Evidence of Insurability (EOI) status. You can change the option in this drop-down field with the following EOI statuses:</p> <ul style="list-style-type: none"> ▪ Not Required ▪ Approved ▪ Required ▪ Denied

Field	Description
EOI Received Date	Enter, or click  to select, the date the EOI document was received by the Human Resources department. This is only enabled when the selected EOI status is either Approved or Denied .

The Approve Dependent Elections subtask provides the following new/updated fields:

Field	Description
Approved by HR	<p>This check box is available only when the benefit plan requires approval (Require HR Approval in ESS check box is selected for the benefit plan on the Enrollment Coverage Rules tab of the Manage Benefit Plans screen). Otherwise, this check box is disabled.</p> <p>If the benefit plan's Require HR Approval in ESS check box is selected, and your ESS Administrator approved the ESS election, this check box displays as selected. However, you can still change this setting.</p> <p>When you select this check box for the selected benefit option line and save the record, the application will select the Approved by HR check box on the Approve Dependent Elections subtask for all dependent election lines.</p>
EOI Status	<p>If applicable, this field displays the dependent's Evidence of Insurability (EOI) status. You can change the option in this drop-down field with the following EOI statuses:</p> <ul style="list-style-type: none"> ▪ Not Required ▪ Approved ▪ Required ▪ Denied
EOI Received Date	Enter, or click  to select, the date the EOI document was received by the Human Resources department. This is only enabled when the selected EOI status is either Approved or Denied .

Note: The following applies to the Approve Open Enrollment Elections by Plan screen:

- The **EOI Status** field and the **EOI Received Date** field on the Approve Dependent Elections subtask are always visible and disabled. They will only be editable or enabled when the benefit type is Spouse Life or Spouse AD&D only and the benefit plan's **Evidence of Insurability Required** check box is selected.
- In the Approve Employee Elections section, the **EOI Status** field and **EOI Received Date** field will not be editable. The fields will display the values of the **EOI Status** field and **EOI Received Date** field from the Approve Dependent Elections subtask when the benefit type is Spouse Life or Spouse AD&D only.


The screen also features the following additional updates:

- The application now displays records where either the **Require HR Approval in ESS** check box is selected and/or the **Evidence of Insurability Required** check box is selected.

- A new query condition which lets you search by **EOI Status** field, is now available.


Manage Open Enrollment Elections (AOMESSBE)

The Benefit Plan Details table provides the following new/updated fields:

Field	Description
Approved by HR	<p>This check box is available only when the benefit plan requires approval (Require HR Approval in ESS check box is selected for the benefit plan on the Enrollment Coverage Rules tab of the Manage Benefit Plans screen). Otherwise, this check box is disabled.</p> <p>If the benefit plan's Require HR Approval in ESS check box is selected, and your ESS Administrator approved the ESS election, this check box displays as selected. However, you can still change this setting.</p> <p>When you select this check box for the selected benefit option line and save the record, the application will select the Approved by HR check box on the Edit Dependent Elections subtask for all dependent election lines.</p>
EOI Status	<p>If applicable, this field displays the employee's Evidence of Insurability (EOI) status. You can change the option in this drop-down field with the following EOI statuses:</p> <ul style="list-style-type: none"> ▪ Not Required ▪ Approved ▪ Required ▪ Denied
EOI Received Date	<p>Enter, or click  to select, the date the EOI document was received by the Human Resources department. This is only enabled when the selected EOI status is either Approved or Denied.</p>

The Edit Dependent Elections subtask provides the following new/updated fields:

Field	Description
Approved by HR	<p>This check box is available only when the benefit plan requires approval (Require HR Approval in ESS check box is selected for the benefit plan on the Enrollment Coverage Rules tab of the Manage Benefit Plans screen). Otherwise, this check box is disabled.</p> <p>If the benefit plan's Require HR Approval in ESS check box is selected, and your ESS Administrator approved the ESS election, this check box displays as selected. However, you can still change this setting.</p> <p>When you select this check box for the selected benefit option line and save the record, the application will select the Approved by HR check box on the Edit Dependent Elections subtask for all dependent election lines.</p>
EOI Status	<p>If applicable, this field displays the dependent's Evidence of Insurability (EOI) status. You can change the option in this drop-down field with the following EOI statuses:</p>

Field	Description
	<ul style="list-style-type: none"> Not Required Approved Required Denied
EOI Received Date	Enter, or click  to select, the date the EOI document was received by the Human Resources department. This is only enabled when the selected EOI status is either Approved or Denied .

Note: The following applies to the Manage Open Enrollment Elections screen:

- The **EOI Status** field and the **EOI Received Date** field on the Edit Dependent Elections subtask are always visible and disabled. They will only be editable or enabled when the benefit type is Spouse Life or Spouse AD&D only and the benefit plan's **Evidence of Insurability Required** check box is selected.
- In Benefit Plan Details section, the **EOI Status** field and **EOI Received Date** field will not be editable. The fields will display the values of the **EOI Status** field and **EOI Received Date** field from the Edit Dependent Elections subtask when the benefit type is Spouse Life or Spouse AD&D only.

The screen also provides a new query condition which lets you search by **EOI Status** field.

Activate Pending Benefit Elections (AOPESSUE)

The Activate Pending Benefit Elections screen features the following changes:

- The error report now generates EOI status warning messages. These validations prevent the update of the benefit election if the EOI status is **Required** or **Denied**.
- The application will update Manage Employee Evidence of Insurability (EOI) screen where the benefit plan and coverage option EOI status is either **Required**, **Denied**, or **Approved**.

Note: New elections that have an EOI status of **Not Required** are also transferred to the Manage Employee Evidence of Insurability (EOI) screen to keep track of all EOI transactions.

- When EOI has not been approved, the application implements the selected option in the **Substitution Rules** group box on the Manage Benefit Plans screen.

Configure Benefit Settings (HBMSET)

The screen provides the following new field:

Field	Description
# of Days Employees are classified as new	Enter how many days employees will be classified as new employees for benefit election purposes. This number will be used by the Evidence of Insurability (EOI) calculation to determine which employees are considered new.

Configure Self Service Settings (ESMESS)

The screen provides the following new field:

Field	Description
Show Evidence of Insurability fields in Insurance screens	Select this check box to display the EOI Form URL/Location and EOI Status fields in insurance applications.

Total Comp/Benefits Statement (ESQCOMPBEN)

If applicable, the application now uses the benefit plan's **Coverage Limit** field for any coverage/premium calculations.

Total Compensation (HTMTOTALCOMP)

If applicable, the application now uses the benefit plan's **Coverage Limit** field for any coverage/premium calculations.

Updated VETS-4212 Options on the Manage Employee Information Screen

The Manage Employee Information screen now provides updated veteran statuses to conform to standards in the VETS-4212 Report. This enhancement also updates related Costpoint applications that handle veteran status information.

Manage Employee Information (LDMEINFO)

The **VETS-4212 Protected Veteran Status** group box provides the following updated/new check boxes/fields. This group box was previously named as **VETS-4212 Data**.

Field	Description
Recently Separated Veteran	This check box indicates if this employee is a recently separated veteran. When you select this check box, the application enables the Discharge/Release Date field, but it is not a required field. The VETS-4212 report will use this check box to categorize the employee as a protected veteran if the date field is not blank and the release date is within 3 years of the report date.
Not a Protected Veteran	Select this check box if the employee specified that he/she is not a protected veteran (as defined by the VETS-4212 report). The VETS-4212 report will not count this employee as a veteran.
Declined to provide veteran status	Select this check box if the employee if did not wish to disclose his/her veteran status. The

Field	Description
	VETS-4212 report will not count this employee as a veteran.

The following are the updated field names on the screen:

New Field Name	Old Field Name
Birth City	City
Birth State/Province	State/Province
Birth Country	Country
Last Review Date	Last
Next Review Date	Next

The following are no longer available on the screen:

- Other Military Statuses group box
- Special Disabled Veteran check box
- Vietnam Era Veteran check box
- Reservist check box
- Birth Location group box
- Review Dates group box
- Miscellaneous Data group box

View Employee Information (PRQEINFO)

The **VETS-4212 Protected Veteran Status** group box provides the following updated/new check boxes/fields. This group box was previously named as **VETS-4212 Data**.

Field	Description
Recently Separated Veteran	This check box indicates if this employee is a recently separated veteran. When you select this check box, the application enables the Discharge/Release Date field, but it is not a required field. The VETS-4212 report will use this check box to categorize the employee as a protected veteran if the date field is not blank and the release date is within 3 years of the report date.
Not a Protected Veteran	This check box indicates if the employee is not a protected veteran as defined by the VETS-4212 report. The VETS-4212 report will not count this employee as a veteran.

Field	Description
Declined to provide veteran status	This check box indicates if the employee did not wish to disclose his/her veteran status. The VETS-4212 report will not count this employee as a veteran.

The following are the updated field names on the screen:

New Field Name	Old Field Name
Birth City	City
Birth State/Province	State/Province
Birth Country	Country
Last Review Date	Last
Next Review Date	Next

The following are no longer available on the screen:

- Other Military Statuses group box
- Special Disabled Veteran check box
- Vietnam Era Veteran check box
- Reservist check box
- Birth Location group box
- Review Dates group box
- Miscellaneous Data group box

Transfer Talent Management Data (EMPHRSDAT)

The Employee data import process now includes **Recently Separated Veteran** and **Not a Protected Veteran** check boxes from Talent Management.

The following fields were added to the Employee staging table:

- VET_STATUS_NP (Not a protected veteran)
- VET_STATUS_DECLINED (Declined to provide a veteran status)
- VET_STATUS_RS (Recently separated veteran)

Employee Personal Info (ESQEMPLPERINFO)

The **Military Status** group box provides the following new check boxes:

Field	Description
Protected Veteran (Declined to Self-Identify)	This check box indicates if the employee is a protected veteran (as defined by the VETS-4212

Field	Description
	report) but declined to select a category. The VETS-4212 report will count this employee as a veteran.
Not a Protected Veteran	This check box indicates if the employee is not a protected veteran (as defined by the VETS-4212 report). The VETS-4212 report will not count this employee as a veteran.
Declined to provide veteran status	This check box indicates if the employee did not wish to disclose his/her veteran status. The VETS-4212 report will not count this employee as a veteran.

The following check boxes are no longer available on the screen:

- Special Disabled Veteran
- Vietnam Era Veteran
- Reservist

Print VETS-4212 Report (HARV100)

The report was updated to include employees with a **Recently Separated Veteran** status as a veteran if the **Discharge/Release Date** is blank. This will allow employees imported from Talent Management to be included in the report since they do not send a **Discharge/Release Date**.

New Total Compensation Control on the Configure Team Management Settings Screen

Prior to this release, Costpoint used the controls on the Configure Self Service Settings screen in Employee Self Service to display the total compensation summary and benefit elections on the Total Compensation screen in Team Management. This enhancement adds new separate settings on the Configure Team Management Settings screen that allow you to control the total compensation information on the Total Compensation screen.

Configure Team Management Settings (HTMSETTINGS)

The screen provides the following updated/new fields:

Field	Description
View Employee Data	<p>These existing options were previously labeled as “Team Management.”</p> <p>The View Employee Data options allow you to specify if managers are able to view only the records of their direct reports; or both their direct and indirect reports on Costpoint Team Management screens.</p>

Field	Description
Show Total Compensation Summary	<p>Select this check box to display the total compensation summary on the Total Compensation screen in Team Management.</p> <p>You can view a total compensation summary that lists such things as your annual salary, leave benefits, and others.</p>
Show Benefit Elections in Total Compensation	<p>Select this check box to display benefit elections on the Total Compensation screen in Team Management.</p> <p>You can view benefit elections and their coverage level as well as employee/employer costs.</p>

Total Compensation (HTMTOTALCOMP)

The database table/field references in the application were updated to reflect the transfer of the Show Benefit Elections in Total Compensation flag (SHOW_BEN_ELEC_FL) and Show Total Compensation Summary flag (SHOW_TOT_COMP_FL) from the Employee Self Service configuration (ESS_CONFIG) table to the Team Management Settings (HT_SETTINGS) table.

Set Up Company (SYPCOMP)

The application now includes the new fields on the Configure Team Management Settings screen when you add new companies in Costpoint.

New Supervisor Field on the Manage Employee Salary Information Screen

The Manage Employee Salary Information screen now provides a new **Supervisor** field that is trackable by dates. This new field uses the **Employee ID** lookup functionality, unlike the existing **Supervisor Name** field on the Manage Employee Information screen which only uses free form data entry. The new **Supervisor** field will not replace the existing **Manager** field on the Manage Employee Salary Information screen. However, both fields will have the same attributes.

If you are licensed for Costpoint Human Resources (HR), the default value of the **Supervisor** field on the Manage Employee Salary Information screen will come from one of the following screens:

- Manage Managers/HR Reps by Organization
- Manage Managers/HR Reps by HR Organization
- Manage Detail Position Descriptions


Applications that export **Manager** field values, such as the Export Data to Deltek Time and Expense screen and the Transfer Talent Management Data screen, also support this new enhancement. These applications allow you to select whether the manager data or supervisor data from Manage Employee Salary Information will be included in the data transfer process.

This enhancement also updates the lookup functionality and field labels in multiple applications.

Manage Employee Salary Information (LDMEHIS)

Note: These updates are also available on the Salary Details subtask of the Manage Employee Information screen.

The screen contains the following new fields:

Field	Description
Supervisor	<p>Enter, or click  to select, the employee ID of the employee's supervisor. If you are not licensed for Costpoint HR, the lookup results will display all employee IDs.</p> <p>If you are licensed for Costpoint HR, the lookup results will display the following based on the corresponding setup:</p> <ul style="list-style-type: none"> ▪ Supervisors assigned to active HR organization from Login Company only: This applies when the Allow HR Org Manager/Rep/Spvsr from Other Companies check box is cleared on the Configure System Settings screen, and the Manager Defaulting Method is By HR Organization on the Configure Personnel Settings screen. ▪ Supervisors assigned to active HR organization from all companies: This applies if the Allow HR Org Manager/Rep/Spvsr from Other Companies check box is selected on the Configure System Settings screen, and the Manager Defaulting Method is By HR Organization on the Configure Personnel Settings screen. ▪ Supervisors assigned to company-wide organization: This applies if the Manager Defaulting Method is By Company-Wide Organization on the Configure Personnel Settings screen.
Supervisor Name	This field displays the name of the employee's supervisor.
Manager Name	This field displays the name of the employee's manager.

If you are licensed for Costpoint HR, the Manage Employee Salary Information screen uses the following levels to load the default value in the **Supervisor** field:

Default Level	Default Value	Costpoint Setup
1	Supervisor assigned to organization on the Manage Managers/HR Reps by Organization screen	<ul style="list-style-type: none"> ▪ On the Configure Personnel Setting screen, the Manager Defaulting Method is By Company-Wide Organization. ▪ On the Manage Employee Salary Information screen, a home organization is assigned to the employee. ▪ On the Managers/HR Reps by Organization screen, a supervisor is assigned to the employee's home organization.
2	Supervisor assigned to HR organization on the Managers/HR	<ul style="list-style-type: none"> ▪ On the Configure Personnel Setting screen, the Manager Defaulting Method is By HR Organization.

Default Level	Default Value	Costpoint Setup
	Reps by HR Organization screen	<ul style="list-style-type: none"> On the Manage Employee Salary Information screen, an HR organization is assigned to the employee. On the Managers/HR Reps by HR Organization screen, a supervisor is assigned to the employee's HR organization.
3	Supervisor assigned to Detail Job Title in Manage Detail Position Descriptions screen	<ul style="list-style-type: none"> On the Manage Employee Salary Information screen, the Detail Job Title is specified. The Detail Job Title exists on the Manage Detail Position Descriptions screen.

View Salary Information and History (PRQEHIS)

The screen provides the following new fields:

Field	Description
Supervisor	This field displays the employee ID of the employee's supervisor from the Manage Employee Salary Information screen.
Supervisor Name	This field displays the name of the employee's supervisor.
Manager Name	This field displays the name of the employee's manager.

Configure Personnel Settings (HPMSET)

The label of the existing **Manager Defaulting Method** check box changed to "Manager and Supervisor Defaulting Method."

Transfer Talent Management Data (EMPHRSDAT)

The screen contains the following new check boxes:

Field	Description
Import Salary Information Supervisor Data instead of Manager Data	Select this check box to import Deltek Talent Management managers as supervisors into the Supervisor field on the Manage Employee Salary Information screen.
Export Salary Information Supervisor Data instead of Manager Data	Select this check box to export the supervisors instead of the managers from the Manage Employee Salary Information screen to Deltek Talent Management.

Export Data to Deltek Time and Expense (LDPDTC)

The screen contains the following new check box:


Field	Description
Export Salary Information Supervisor Data instead of Manager Data	Select this check box to export the supervisors instead of the managers from the Manage Employee Salary Information screen when you export employee data.

Configure System Settings (SYMSETNG)

The label of the existing **Allow HR Org Manager/Rep from Other Companies** check box changed to "Allow HR Org Manager/Rep/Spvsr from Other Companies."


Manage Managers/HR Reps by Organization (HSMMGMR)

The screen contains the following new fields:

Field	Description
Supervisor	Enter, or click  to select, the employee ID of the supervisor for the home organization, if applicable.
Supervisor Name	This field displays the name of the selected supervisor.

Manage Managers/HR Reps by HR Organization (HPMHRORG)

The screen contains the following new fields:

Field	Description
Supervisor	Enter, or click  to select, the employee ID of the supervisor for the HR organization, if applicable.
Supervisor Name	This field displays the name of the selected supervisor.

Manage Detail Position Descriptions (HPMDPOS)

The lookup functionality in the **Supervisor** field was updated.

The lookup results will display supervisors assigned to an active HR organization from the Login Company only if you have the following setup:

- The **Allow HR Org Manager/Rep/Spvsr from Other Companies** check box is cleared on the Configure System Settings screen.
- The **Manager Defaulting Method** is **By HR Organization** on the Configure Personnel Settings screen.

The lookup results will display supervisors assigned to an active HR organization from all companies if you have the following setup:

- The **Allow HR Org Manager/Rep/Spvsr from Other Companies** check box is selected on the Configure System Settings screen.
- The **Manager Defaulting Method** is **By HR Organization** on the Configure Personnel Settings screen.

The lookup results will display supervisors assigned to a company-wide organization if you have the following setup:

- The **Manager Defaulting Method** is **By Company-Wide Organization** on the Configure Personnel Settings screen.

Team Details (HTMDETAIL)

The screen contains the following new field on the Current Salary Information tab:

Field	Description
Supervisor	This field displays the supervisor from the employee's salary information.

Team Information Report (HTRTEAMINFO)

The employee's supervisor information is now displayed on the report. This update is available whether you select to include **All Historical Data** or **Current Only** salary information in the report.

Print Data Dictionary Report (SYRDD)

The report now provides information for the new Supervisor columns in the following database tables:

- EMPL_LAB_INFO
- EMPL_LAB_INFO_ADT
- ORG_MGR_DFLT
- HR_ORG_MGR_DFLT

Audit File Tracking of Basic Employee Information and Employee Salary Information for Non-Payroll Users

This Costpoint release provides non-payroll users with the ability to track adding, updating, and deleting of records on the Manage Employee Information screen and Manage Employee Salary Information screen. To support this enhancement, the following controls for audit file tracking were transferred from the Configure Payroll Settings screen to the Configure Labor Settings screen:

- Basic Employee Information
- Employee Salary Information

Costpoint Menu Updates

This release also includes the following updates to the Costpoint menu:

- A new menu option, **Education, Skills and Training Controls**, is listed under the Employee module. This menu now provides access to the following applications which were previously available in the **Employee Controls** menu:
 - Manage Areas of Education
 - Manage Courses
 - Manage Degrees
 - Manage Professional Organizations
 - Manage Skill Codes
 - Manage Skill Levels
 - Manage Training Codes
 - Manage Training Locations
 - Manage Training Sources
 - Manage Training Program Schedules
 - Print Training Program Schedules
- The name of the **Employee Reports** menu in the Employee module changed to **Employee Reports/Inquiries**. This menu now has the following submenus:

Submenu	Applications
Reports	<ul style="list-style-type: none"> ▪ Print Employee Awards List ▪ Print Employee Basic Report ▪ Print Employee Job Title Report ▪ Print Employee Medical Surveillance Data Report ▪ Print Employee Salary Information Report ▪ Print Employee Setup Report ▪ Print FLSA Status Report ▪ Print New Hire Report
Inquiries	<ul style="list-style-type: none"> ▪ View Employee Information ▪ View Salary Information and History <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: These applications were previously available in Payroll » Payroll Reports » Inquiries.</p> </div>

Configure Payroll Settings (PRMPRSET)

The following check boxes are no longer available in the Enable Audit File Tracking group box:

- Basic Employee Information
- Employee Salary Information

Configure Labor Settings (LDMLABOR)

A new **Enable Audit File Tracking** group box provides the following check boxes:

Field	Description
Basic Employee Information	Select this check box to enable audit tracking for adding new records, updating existing records, or deleting existing records on the Manage Employee Information screen. These modifications are available for display on the View Employee Information screen. If this check box is later cleared, all future record additions, updates, and/or deletions are not written to the audit file table. The Basic Employee Info Audit table still contains any records written when the check box was selected.
Employee Salary Information	Select this check box to enable audit tracking for adding new records, updating existing records, or deleting existing records on the Manage Employee Salary Information screen. These modifications are available for display on the View Salary Information and History screen. If this check box is later cleared, all future record additions, updates, and/or deletions are not written to the audit file table. The Salary Info and History Audit table still contains any records written when the check box was selected.

Manage Employee Salary Information (LDMEHIS)

The audit tracking functionality on this screen is now controlled from the Configure Labor Settings screen instead of the Configure Payroll Settings screen.

Manage Employee Information (LDMEINFO)

The audit tracking functionality on this screen is now controlled from the Configure Labor Settings screen instead of the Configure Payroll Settings screen.

Multiple Applications

The database table/field references in multiple Costpoint applications were updated to reflect the transfer of the Audit Salary Info Flag (AUDIT_SAL_INFO_FL) and Audit Basic Flag (AUDIT_BASIC_FL) from the Payroll Settings (PR_SETTINGS) table to the Labor Settings (LAB_SETTINGS) table. This includes the following screens:

- View Employee Information (PRQEINFO)
- View Salary Information and History (PRQEHIS)
- Link Talent Management User IDs to Existing Employees (EMPTMUI)
- Manage Plants (INMPLANT)
- Manage Employee Project Manufacturing Status (PCMEEPM)
- Address/Phone (ESMADDRESSPHONE)
- Emergency Contacts (ESMEMERCON)
- Team Management-Emergency Contacts (HTMEMERGENCYCONTACT)
- Activate Pending Change Requests (HTPCHANGES)
- Update Employees for Manager Change (HSPMGR)
- Life Events/New Hires (ESMLIFEEVENT)

Set Minimum Amount for HSA and FSA Elections

Costpoint now gives you the ability to set a minimum amount for Health Savings Account (HSA) and Flexible Spending Account (FSA) elections. To support this new functionality, the following screens each provide a new field for setting the minimum election amount for the plan year:

- Manage HSA Plan Year (HBMHSET)
- Manage Medical Care FSA Plan Year (HBMMCSET)
- Manage Dependent Care FSA Plan Year (HBMDSET)

If your company does not have a minimum election amount, you can leave the minimum amount at **0.00**. Employees must elect an amount for the plan year that is equal to or greater than the minimum amount. Costpoint applications where you can select FSA and HSA elections provide new validations to ensure that the election meets the new requirements. If the employee's FSA/HSA election is **0.00**, it will not be subject to the new validation because it is not an actual election.

Manage Medical Care FSA Plan Year (HBMMCSET)

The screen contains the following new field:

Field	Description
Minimum Amount	Enter the minimum amount that employees are allowed to elect for medical care FSA expenses for the plan year.

Manage Dependent Care FSA Plan Year (HBMDSET)

The screen contains the following new field:

Field	Description
Minimum Amount	Enter the minimum amount that employees are allowed to elect for dependent care FSA expenses for the plan year.

Manage HSA Plan Year (HBMHSET)

The screen contains the following new and revised fields:

Field	Description
Employee Minimum	Enter the minimum amount that employees are allowed to elect for the HSA plan year.
Employee Maximum	Enter the maximum amount that the employee may contribute in a plan year. The label of this existing field changed from "Employee Limit" to "Employee Maximum."

Field	Description
Employer Maximum	<p>Enter the maximum amount that the employee may contribute in a plan year.</p> <p>The label of this existing field changed from “Employer Limit” to “Employer Maximum.”</p>

Benefits Enrollment (ESMBENENROLL)

The application contains new validation to ensure that the employee elects the minimum amount for FSA/HSA elections. This exists on the following tabs:

- Medical FSA
- Dependent FSA
- Medical HSA

Life Events/New Hires (ESMLIFEEVENT)

The application contains new validation to ensure that the employee elects the minimum amount for FSA/HSA elections. This exists on the following tabs:

- Medical FSA
- Dependent FSA
- Medical HSA

Manage Open Enrollment Elections (AOMESSBE)

The application contains new validation to ensure that the employee elects the minimum amount for medical and dependent FSAs and HSAs.

Manage Life Event Elections (AOMESSBL)

The application contains new validation to ensure that the employee elects the minimum amount for medical and dependent FSAs and HSAs.

Manage Employee Medical Care FSA Elections (HBMMFSA)

The application contains new validation to ensure that the employee elects the minimum amount.

Manage Employee Dependent Care FSA Elections (HBMEFSA)

The application contains new validation to ensure that the employee elects the minimum amount.

Manage Employee HSA Elections (EMMEHSA)

The application contains new validation to ensure that the employee elects the minimum amount.

Configure Global Settings (AOMESSGS)

The following field on the screen is now enabled to allow you to set the ESS version that your company is using:

Field	Description
ESS Version	<p>From the drop-down list, select the ESS version that your company is using. Valid options are:</p> <ul style="list-style-type: none"> ▪ Deltek ESS 9 ▪ Deltek ESS 10+

New Cache Tables and CSV Export Files Option for Exporting Data to Deltek Time and Expense

To improve the integration between Costpoint and Deltek Time and Expense, this enhancement adds new permanent work tables as part of the data download process between the two systems. For co-deployed installations, this means that you are no longer required to export/import the following links:

- **LINK12:** UDT01/UDT02 (Account/Project or Account/MO)
- **LINK19:** UDT01/UDT09 (Account/Org)
- **LINK27:** UDT02/UDT07 (Project/PLC or MO/Routing)
- **LINK 29:** UDT02/UDT09 (Project/Org)

When you set up the Export Data to Deltek Time and Expense (LDPDTC) screen to transfer link table information (LINK12, LINK19, LINK27, or LINK29), the application will insert records into the permanent work tables instead of into an export file. Deltek Time and Expense will also use the work tables to validate data.

Note: No changes are required to use this enhancement if your systems are co-deployed and if direct linking of UDTs is already enabled in Deltek Time and Expense. However, to populate the new Link tables the first time, you must run the export from Export Data to Deltek Time and Expense screen.

The Export Data to Deltek Time and Expense screen also provides a new option that allows you to still create CSV export files. You can access the following new field on the on the Export Information tab of the screen.

Field	Description
Create CSV Export Files for Link Tables	<p>When you export link tables (LINK12, LINK19, LINK27, or LINK29), select this check box to create a CSV export file and insert the data in permanent cache tables.</p> <p>If you opt not to select this check box, the application will only insert data into permanent cache tables.</p>

Note: If your version of Time & Expense is not co-deployed with Costpoint and you want to create an export file, you must select the **Create CSV Export Files for Link Tables** check box.

Materials

This section describes Costpoint 8.0 enhancements for the Materials domain.

Supplier Portal-Shipping Notifications

The Supplier Portal Shipping Notifications feature enables 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. On the part of the buyer, this feature allows them to receive email notifications when items are shipped from a supplier. In addition, this feature provides both the buyer and the supplier visibility on PO items that have been shipped.

Manage Shipping Information (SPMSHIP)

The supplier can use this new screen (**Materials » Supplier Portal » Dashboards/Actions » Manage Shipping Information**) to enter information regarding shipped quantities against purchase order lines/delivery schedule lines. Access to this application will be based on rights provided to the supplier/user by the system administrator.

The supplier (user) will be able to view and enter shipping information only for purchase orders with a vendor ID that matches the vendor ID on the company to which the supplier is logged in. This ensures that a particular supplier cannot see POs for a different supplier.

Manage Supplier Actions (SPMSPACT)

New fields have been added to the Action History subtask to display information related to a shipping notification entered/edited by the supplier on the Manage Shipping Information screen.

Manage Purchase Orders (POMMAIN)

The application has been changed to prevent the deletion of the PO/Rlse/PO line/Del Sch Line if a shipment and shipment line exist for the purchase order.

Manage Buyers (POMBUY)

You can now enable email notification to be sent to the buyer for shipment information entered by the supplier via the portal using the new **Shipment Email Notification** check box. If this is selected, email notifications will be sent to the buyer for all of the buyer's purchase orders.

Archive Purchase Orders (POPARCH)

This screen now automatically deletes all associated shipment information for the archived PO/Rlse.

Supplier Portal-Invoice Management

This feature provides 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 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.

Set Up Company (SYPCOMP)

Set Up Company (SYPCOMP) has been modified to include the new fields on the Configure Purchase Order Voucher Settings (POMAPSET) screen when copying settings from one company to another. The new fields are:

- **Invoice Email Notification** check box (VCHR_SETTINGS.INVC_EMAIL_FL)
- **Invoice Email** (VCHR_SETTINGS.INVC_EMAIL_ID)

Configure Purchase Order Voucher Settings (POMAPSET)

The **Supplier Portal** group box has been added to the Configure Purchase Order Voucher Settings screen. It contains the following:

- **Invoice Email Notification** check box: Use this check box to enable the sending of email notifications to an Accounts Payable (AP) user when a Supplier Portal user approves or rejects an invoice.
- **Email** field: Enter the email address of the AP user who will receive invoice approval or rejection notifications.

Note: If you are not licensed for Supplier Portal, the **Supplier Portal** group box is hidden.

Manage Purchase Order Vouchers (POMPOVCH)

The Manage Purchase Order Vouchers screen has been updated to prohibit you or a Supplier Portal user from deleting any voucher created from a digitally signed invoice. Any discrepancy must be fixed through a correcting invoice.

This functionality applies only if the Digital Signature feature is enabled for you and the Supplier Portal user.

Manage Invoices (SPMINVC)

A new application, Manage Invoices (SPMINVC), has been added to the Supplier Portal module (**Materials » Supplier Portal » Dashboards/Actions » Manage Invoices**) to enable suppliers to do the following:

- Approve/reject invoices created by a payer in Costpoint using the Create Subcontractor Invoices and Manage Subcontractor Invoices. This applies to invoices for Subcontractor Agreement or Subcontractor Agreement Release PO type.
- Manually enter a new invoice directly or based on shipments made against the PO/lines. This applies to invoices for all PO types, except Subcontract Retainage PO.
- View the information in the staging tables exported from Time and Expense, and automatically generate a new invoice based on the exported data. This applies to invoices for Subcontractor Agreement or Subcontractor Agreement Release PO type.
- Query approved invoices of all PO types with vendor ID that matches the vendor ID on the company that the user is logged into.

Note: Access to this application is based on rights provided to the user by the system administrator.

This new application ensures data security by matching the PO vendor ID with the vendor ID on the company that the user is logged into. For organization security, the new screen will only show data from POs with a buyer's organization ID that the user is authorized for based on the organization security profile linked to the organization security group associated with the user ID. Once this organization security has been established, Costpoint will display all PO lines/delivery lines regardless of rights to projects and organization rights at the account distribution level.

Email Alerts

This application sends an email notification to the payer whenever changes are made to the invoice, and **Invoice Email Notification** is selected on the Configure Purchase Order Voucher Settings screen.

Supplier Portal Dashboard (SPDSP)

Two new dashparts, Subcontractor Invoices/Vouchers and Purchase Order Invoices/Vouchers, have been added to the screen to view/update information regarding the status of invoices/vouchers.

The Subcontractor Invoices/Vouchers dashpart is automatically populated with bars that indicate the status of invoices/vouchers. Click the bar hyperlink to go to the Manage Invoices screen and load the corresponding invoice.

The Purchase Order Invoices/Vouchers dashpart displays a list of invoices that are not fully approved, and unposted approved invoices that are pending approval by the payers Accounts Payable (A/P) department. Click the PO hyperlink to go to the Manage Invoices screen and load the corresponding invoice.

The organization security setting in Costpoint ensures that the dashparts will only include invoices/vouchers for purchase orders with a buyer's organization ID for which the user is authorized based on the organization security profile linked to the organization security group associated with the user ID.

Manage Subcontractor Invoices (SMMMINVC)

The following updates have been made to Manage Subcontractor Invoices:

- You can now query invoice records created by the subcontractor/supplier, but all information displayed on the screen will be read-only. Note, however, that you will not be able to delete invoices or invoice lines created by the subcontractor/supplier.
- The **Subcontractor Approval** group box on the Invoice Approvals tab has been renamed to **Supplier Approval**.
- The **Date** field on the **Internal Approval** and **Supplier Approval** group boxes has been changed to **Date/Time**, and now displays both the date and time of the invoice approval.
- A new Invoice Approval History subtask lets you view approval action changes made to the invoice. This subtask is read-only and provides details on the approval action, the date and time the approval action or notes were last updated, and the user ID of the person who updated the approval action or notes.

Manage Subcontractor Invoices updates this subtask and the VCHR_HDR_ACTION table if any of the following actions are performed on this screen:

- A new subcontractor invoice is created and the **Submit for Approval** check box is selected on this screen.
- An existing invoice line is deleted (without deleting the invoice).
- An existing invoice is deleted.

- This application now supports email alerts. If you are licensed for Supplier Portal and the **Invoice Email Notification** check box is selected on the Configure Purchase Order Voucher Settings screen, Costpoint sends an email notification to the subcontractor/supplier when you create a subcontractor invoice (that is subject for approval) or delete an existing invoice or invoice line. Costpoint sends notifications to the email address indicated in the Contact **Email Address** field on the Other Information tab of the Manage Purchase Orders screen.

Approve Subcontractor Invoices (SMMAINVC)

This application now performs validation to ensure that the receipt ID, packing slip, and material handler exist for the subcontractor invoice before the invoice can be approved internally. Previously, these validations were performed only after the invoice has been approved by both the internal approver and the subcontractor. This change is implemented to avoid any system errors that can occur when the subcontractor later approves the invoice since the receipt ID, packing slip, and material handler are not displayed on the new Manage Invoices screen.

Invoices created through Manage Invoices now also display on the Approve Subcontractor Invoices screen.

Similar with Manage Subcontractor Invoices, Approve Subcontractor Invoices also has the new Invoice Approval History subtask. This subtask is read-only and provides details on the approval action, the date and time the approval action or notes were last updated, and the user ID of the person who updated the approval action or notes.

Approve Subcontractor Invoices updates this subtask and the VCHR_HDR_ACTION table if any of the following actions are performed on this screen:

- The internal approver approves the invoice either manually or digitally.
- The internal approver adds or changes the entry in the **Notes** field without changing the approval status of the existing invoice.
- The internal approver withdraws the previous approval, either by clearing the **Approved** check box or by selecting **Unsign** from the **Sign** drop-down list on the toolbar (the latter if digital signature applies to the invoice).

This application also supports email alerts. If you are licensed for Supplier Portal and the **Invoice Email Notification** check box is selected on the Configure Purchase Order Voucher Settings screen, Costpoint sends an email notification to the subcontractor/supplier when the internal approver approves, withdraws, or adds/changes notes for the invoice. Costpoint sends notifications to the email address indicated in the Contact **Email Address** field on the Other Information tab of the Manage Purchase Orders screen.

Other updates made on this screen include the following:

- The **Subcontractor Approval** group box has been renamed to **Supplier Approval**. All fields in this group box are now disabled if you are licensed for Supplier Portal since suppliers/subcontractors can approve invoices in the portal.
- The **Date** field on the **Internal Approval** and **Supplier Approval** group boxes has been changed to **Date/Time**, and now displays both the date and time of the invoice approval.
- A **Notes** field has been added to the **Internal Approval** and **Supplier Approval** group boxes so you can enter or view notes regarding the invoice approval.

Create Subcontractor Invoices (SMPINVC)

This application has been updated to distinguish if the invoice was created directly from this screen or from the Manage Invoices (SPMINVC) application.

Supplier Portal-Digital Signature for Invoices

This feature allows 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.

Note: For more information about this enhancement, see the [Digital Signature Admin Updates](#).

Manage Vendors (APMVEND)

The **Enable Digital Signature** check box has been added to the Manage Vendors screen. If you are licensed for Supplier Portal, you can use this check box to allow a vendor to use a digital signature to approve invoices associated to them.

If you are not licensed for Supplier Portal, the **Enable Digital Signature** check box is hidden.

If you select the **Enable Digital Signature** check box for a vendor and you and/or the vendor digitally signs an invoice, that invoice or a voucher created from that invoice can no longer be deleted. Any discrepancy must be fixed through a correcting invoice. Likewise, you will not be able to change the digital signature setting while there are existing unposted vouchers or partially approved invoices for that vendor.

If you are licensed for Supplier Portal and you do not select the **Enable Digital Signature** check box, you and the vendor can approve invoices using the **Approved** check box on the Manage Invoices screen. If you and the vendor both approve a voucher without a digital signature, you can still delete the approved voucher, but the vendor cannot.

Manage Purchase Order Vouchers (POMPOVCH)

The Manage Purchase Order Vouchers screen has been updated to prohibit you or a Supplier Portal user from deleting any voucher created from a digitally signed invoice. Any discrepancy must be fixed through a correcting invoice.

This functionality applies only if the Digital Signature feature is enabled for you and the Supplier Portal user.

Manage Subcontractor Invoices (SMMMINV)

This application has been updated to prohibit deletion of an invoice or invoice line if you or the subcontractor/supplier has digitally signed the invoice. You can delete a digitally signed invoice only after both parties have unsigned it.

Approve Subcontractor Invoices (SMMAINVC)

If digital signature applies to the invoice, the **Approved** check box in the **Internal Approval** group box is disabled and the **Sign** drop-down list becomes available on the application toolbar. All options in this list are active if digital signature is on, the invoice is a digital signature document, and you are using a FIDO device. You can select from the following options:

- **Sign:** Select this option to digitally sign the invoice. Once selected, Costpoint displays a disclosure agreement that you need to acknowledge. After you accepted the disclosure

agreement, Costpoint asks you to confirm the displayed data. Upon confirmation, the system saves the invoice data with the digital signature, and the **Approved** check box will automatically be selected but still disabled.

- **Verify:** Select this option to view differences between what was last signed and what is on the screen. This option can be used only on invoices that were signed by either the internal approver or the supplier but not both.
- **Info:** Select this option to view the last information that was digitally signed.
- **Unsign:** Select this option to withdraw approval of a previously signed invoiced. The **Approved** check box becomes cleared when you select this option.

The **Notes** field in the group box remains editable even after you digitally signed the invoice (but not yet signed by the subcontractor/supplier) to allow communication between the two parties.

Digital document types are set up on the Manage Digital Document Types screen, while digital signature links are set up on the Manage Digital Document Links screen. If digital signature is on and you have already established the correct document types but the digital signature links have not been set up for the Approve Subcontractor Invoices application, Costpoint displays an error message when you try to digitally sign an invoice.

Note: Digital signature for invoice approvals is allowed only if you are licensed for Supplier Portal. If that license is on, the **Supplier Approval** group box on this screen is disabled since suppliers can approve invoices via the portal.

Manage Invoices (SPMINVC)

On the Manage Invoices screen, when an invoice is digitally signed, the **Approved** check box in the Supplier Approval group box cannot be edited, and deletion of the invoice or invoice line is not allowed. For supplier-created invoices, digital signature will be required if this is enabled for the associated vendor, regardless of the **Require Subcontractor Approval** setting in Configure Subcontractor Management Settings, since approval also submits the invoice for payer approval.

The **Notes** field in the group box remains editable even after you digitally signed the invoice to allow communication between the two parties. If the digital signature function is on, but the digital signature links have not been set up for the Manage Invoices application, Costpoint displays an error message.

Expanding Notes Fields

This enhancement allows 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 both MSS and Oracle database users, the data type can now accommodate up to 99999 characters.

Manage Detailed Part Schedule (MRMDTPT)

The **Expedite Notes** field of the Manufacturing Order Supply subtask now displays more than 254 characters.

Create MO Subcontractor Requisitions (PCMSCRQ)

You can now enter more than 254 characters in the **Internal Notes** field of the requisition Line.

Expedite Purchase Orders (POMEXPD)

You can now enter more than 254 characters in the **PO Line Expediting Notes** and **PO Line Internal Notes** fields

Manage Purchase Orders (POMMAIN)

You can now enter more than 254 characters in the standard PO **Notes** and PO line **Internal Notes** fields.

Update Subcontract Retainage PO Status (POMSCST)

The following notes fields now displays more than 254 characters:

- Subcontract Line Notes
- Subcontract Line Internal Notes
- Subcontract Line Expedite Notes

Create Blanket Purchase Order Releases (POMRELS)

From the blanket order, the PO line expediting notes and internal notes with more than 254 characters can now be carried over to the release order.

Apply PO Info to Purchase Requisitions by Line (PPMRQLN)

You can now enter more than 254 characters in the **Internal Notes** field of the Apply PO Info to Purchase Requisitions by Line and on the following screens:

- Manage Purchase Requisitions (PPMNTRQ1)
- Apply PO Info to Purchase Requisitions (PPMNTRQ2)
- Approve Purchase Requisitions Line (PPMRQAPL)
- Approve Purchase Requisitions (PPMRQAPX)

Manage Simple Purchase Requisitions (PPMQREQ)

This application can now display more than 254 characters for the header notes.

Manage Work Assignments (SMMWRK)

This application can now display more than 254 characters for the standard and internal notes.

View Item Purchasing Information (PPQITEM)

The expediting notes can now display more than 254 characters of the View Item Purchasing Information and on the following screens:

- View Part Inventory
- View Item Purchasing Information
- View Part Inventory
- View Summary Part Availability
- View Part Inventory

- View Part Inventory
- View Item Purchasing Information
- View Purchase Order Status
- View Purchase Order Status
- View Work Assignment Status
- View Item Purchasing Information

View Purchase Requisition Status (PPQRQSTS)

The internal notes can now display more than 254 characters.

Print Purchase Order Expediting Report (POREXPDP)

The PO line expediting and internal notes in the report output can now display more than 254 characters on the Print Purchase Order Expediting Report and on the following screens:

- Print Purchase Order Expediting Report
- Print Purchase Requisitions

Export Project Manufacturing Data (LDPEXPM)

You can now export more than 254 characters of PO line expediting and internal notes.

Archive Purchase Orders (POPARCH)

You can now archive more than 254 characters of PO line expediting and internal notes.

Create Purchase Orders (PPPGPO)

The application can now carry over the requisition line internal notes with more than 254 characters to the PO line internal notes of the created PO.

Import Purchase Requisitions (AOPRQPP)

You can now enter more than 254 characters of internal notes in the requisition line input file for **Delimited** file format.

Autoload Standard Text Options for Lines

This enhancement allows 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. Additional item text or project item text that may have been added after the initial autoload can be loaded by using the **Autoload** button.

Release Manufacturing Bills of Material (BMMMBOM2)

On the Component Text subtask, Costpoint now automatically loads the standard text code/revision combination associated with the part/part/item/revision on the BOM line for your user's company when the following are set in Manage Parts:

- The **Text Active** check box is selected.
- The **Autoload** check box is selected.
- Where-Used is set to Bills of Material (BOM).

The **Autoload Active** check box option has been removed from the screen as it has the same function as the **Text Active** check box.

You can use the **Autoload** button to load any item text that may have been added after the initial autoload. In addition, when you change the part/item/revision, Costpoint automatically loads, upon save, the standard text based on the new part/item/revision.

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

These changes also apply to the Manage Manufacturing Bills of Material (BMMMBOM1) screen.

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Release Engineering Bills of Material (BMMEBOM2)

On the Component Text subtask, Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the BOM line for your user's company when the following are set on the Assigned Standard Text subtask of the Manage Parts:

- The **Text Active** check box is selected.
- The **Autoload** check box is selected.
- Where-Used is set to Bills of Material (BOM).

The **Autoload Active** check box option has been removed from the screen as it has the same function as the **Text Active** check box.

You can use the **Autoload** button to load any item text that may have been added after the initial autoload. In addition, when you change the part/item/revision, Costpoint now automatically loads, upon save, the standard text based on the new part/item/revision.

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

These changes also apply to the Manage Engineering Bills of Material (BMMEBOM1).

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Manage Purchase Requisitions (PPMNTRQ1)

On the Line Text subtask, Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the requisition line for the project used for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to R (Purchase Requisition) or P, or P1–P5 (PO types if the **Subcontractor Agreement** check box is not selected), or P6–P8 (PO types if the **Subcontractor Agreement** check box is selected).

You can use the **Autoload** button to load any item text or project item text that may have been added after the initial autoload. In addition, when you change the part/item/revision, inventory abbreviation, or project, Costpoint now automatically loads, upon save, the item text/project item text based on the new part/item/revision, inventory abbreviation or project ID.

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

These changes also apply to the following screens:

- Apply PO Info to Purchase Requisitions by Line (PPMRQLN)
- Approve Purchase Requisitions (PPMRQAPX)
- Approve Purchase Requisition Lines (PPMRQAPL)
- Apply PO Info to Purchase Requisitions (PPMNTRQ2)

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Manage Request for Quotes by Item (PPMRFQI)

On the Line Standard Text subtask, Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the RFQ and for the Project(s) for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used = Q (Request for Quotes), and if the requisition has the **Subcontractor Agreement** check box selected, or autoload text/rev only if it also has a Where-Used of P or P6–P8 (in addition to a Where-Used of Q).

You can use the **Autoload** button to load any item text or project item text that may have been added after the initial autoload. In addition, when you change the part/item/revision, inventory abbreviation, or project, Costpoint now automatically loads, upon save, the item text/project item text based on the new part/item/revision, inventory abbreviation or project ID.

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

These changes also apply to the Manage Request for Quotes by Vendor (PPMRFQV) screen.

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Manage Purchase Orders (POMMAIN)

On the Line Text subtask, Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the RFQ and for the Project(s) for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to PO types P or P1–P8.

You can use the **Autoload** button to load any item text or project item text that may have been added after the initial autoload. In addition, when you change the part/item/revision, inventory abbreviation, or project, Costpoint now automatically loads, upon save, the item text/project item text based on the new part/item/revision, inventory abbreviation or project ID.

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Manage Sales Orders (OEMNTSO1)

On the Line Standard Text subtask, Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the sales order line and for the Project(s) for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to Sales Order Acknowledgment.

You can use the **Autoload** button to load any item text or project item text that may have been added after the initial autoload. In addition, when you change the item and/or sales group abbreviation, Costpoint now automatically loads, upon save, the item text/project item text based on the new inventory abbreviation or project ID.

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

These changes also apply to the Manage Sales Orders Supervisor Screen (OEMNTSO2).

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Manage Invoices (OEMINVC1)

On the Line Standard Text subtask, Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the sales order line to the invoice line for your user's company when the following are set:

- The **Text Active** check box is selected.
- Where-Used is set to Sales Order Invoice (I) or DD250 Invoices (D).

You can use the **Autoload SO Line Text/Autoload Line Text** buttons to load any item text or project item text that may have been added after the initial autoload.

In addition, when you change the part/item/revision, Costpoint now automatically loads, upon save, the item text/project item text based on the new part/item/revision and/or sales group abbreviation projects.

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

These changes also apply to the Manage Invoices Supervisor Screen (OEMINVC2).

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Compute Material Requirements (PCPMRR)

Costpoint now automatically loads the active item text and/or item project text to the new requisition lines based on the text code and revision, and when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to PO-All PO Types (P), Purchase Requisition (R), or PO-Purchase Order (Standard) (P1), PO-Blanket Order (P2), PO-Blanket Release Order (P3), PO-GFM/GFE Order (P4), and PO-Subcontract Retainage PO (P5).

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

If the text code/rev is inactive upon the creation of the requisition, then Costpoint will not copy it over to the requisition.

Create Invoices (OEPINVC)

Costpoint now automatically loads the active sales order line's text code/revision to the new sales order invoice based on text code and revision for your user's company and the standard text code/revision combinations associated part/project in the sales order line and when the following are set:

- The **Text Active** check box is selected.
- Where-Used is set to Sales Order Invoice (I) or DD250 Invoices (D).

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

If the text code/rev is inactive upon the creation of the requisition, then Costpoint will not copy it over to the requisition.

Import Purchase Orders (AOPUTLPO)

Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the purchase order line and for the project(s) used for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to PO-All PO Types (P), PO-Purchase Order (Standard) (P1), PO-Blanket Order (P2), PO-Blanket Release Order (P3), PO-GFM/GFE Order (P4), PO-Subcontract Retainage PO (P5), PO-Subcontractor Agreement (P6), PO-Subcontractor Agreement Blanket (P7), and PO-Subcontractor Agreement Release (P8).

For existing PO lines, when you change the part/item/revision and/or inventory abbreviation for a particular line in the PO line record type and there are no PO line standard text line record types in the input file, Costpoint now automatically loads, upon save, the standard text code/revision combinations associated with the new part/item/revision on the PO line and for the project(s) used for your user's company.

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Import Purchase Requisitions (AOPRQPP)

Costpoint now automatically loads the active active standard text code/revision combination associated with the part/item/revision on the requisition line and for the project(s) used for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to Purchase Requisition (R), PO-All PO Types (P), PO-Purchase Order (Standard) (P1), PO-Blanket Order (P2), PO-Blanket Release Order (P3), PO-GFM/GFE Order (P4), and PO-Subcontract Retainage PO (P5).

For existing PO lines, when you change the part/item/revision and/or inventory abbreviation for a particular line in the PO line record type and there are no PO line standard text line record types in the input file, Costpoint now automatically loads, upon save, the standard text code/revision combinations

associated with the new part/item/revision on the PO line and for the project(s) used for your user's company.

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Import Sales Orders (AOPSOPP)

Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the sales order line and for the project(s) used for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to Sales Order Acknowledgment (S).

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Import Bills of Material (AOPBOM)

Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the sales order line and for the project(s) used for your user's company when the following are set on the Assigned Standard Text subtask of the Manage Parts screen:

- The **Text Active** check box is selected.
- The **Autoload** check box is selected.
- Where-Used is set to Bills of Material (B).

Create Purchase Orders (PPPGPO)

Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the purchase order line and for the project(s) used for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to PO-All PO Types (P), PO-Purchase Order (Standard) (P1), PO-Blanket Order (P2), PO-Blanket Release Order (P3), PO-GFM/GFE Order (P4), PO-Subcontract Retainage PO (P5), PO-Subcontractor Agreement (P6), PO-Subcontractor Agreement Blanket (P7), and PO-Subcontractor Agreement Release (P8).

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Manage Parts (PDMPART)

On the Assigned Standard Text subtask, the **Autoload Active** field name has been shortened to **Autoload** to avoid confusion with **Text Active**. This change also applies to the following screens:

- Manage Services (PDMSERV)
- Manage Goods (PDMGOODS)

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Manage Standard Text (PJMTEXT)

The **Autoload Active** field name has been shortened to **Autoload** to avoid confusion with **Text Active**.

Manage Manufacturing Orders (PCMMOMNT)

On the Line Text subtask, Costpoint now automatically loads the active standard text code/revision combination associated with the part/item/revision on the build part and for the project(s) used for your user's company when the following are set:

- The **Text Active** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- The **Autoload** check box is selected on the Assigned Standard Text subtask of the Manage Parts screen and in Manage Standard Text (PJMTEXT).
- Where-Used is set to MO Pick List (M), MO Routing Traveler (T), or MO Assembly Sheet Header (A).

Note: You don't have to click the **Autoload** button nor open the subtask for the automatic loading to happen.

You can use the **Autoload** button to load any item text or project item text that may have been added after the initial autoload.

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

View Bills of Materials (BMQSMLB)

On the Line Text subtask, the **Autoload Active** field on the Component Text subtask has been removed from the View Bills of Materials and View Where-Used Bills of Materials screens to make them consistent with other screens.

View Items (PDQINQ)

On the Std Text subtask, the **Autoload Active** field name has been shortened to **Autoload** to avoid confusion with **Text Active**.

Apply Engineering Change Notice (ECPINECN)

Costpoint now automatically loads the active component standard text code/revision when the **Copy Text When Replacing Parts In BOMs** check box is not selected, and also automatically loads the active item standard text code/revision (from the original part to the change-to part) when **Copy Original Part Info** is not selected on the ECN row.

Note: For items and projects with similar standard text code/revision, the standard text code/revision will be displayed once.

Copy Bill of Materials (BMPCOPY)

Costpoint now automatically loads the active component standard text code/revision when the **Copy Component BOM Text Codes** check box is not selected. If a standard text code/revision assigned to a component part/rev is currently inactive, and the **Active** check box in Manage Standard Text and the **Autoload** check box on the Assigned Standard Text subtask of Manage Parts are both not selected, the component standard text code/revision will not be loaded in the copied BOM.

Apply Mass Component Changes to Bills of Material (BMPMCC)

Costpoint now automatically loads the active component standard text code/revision when the **Copy Existing BOM Text** check box is not selected. If a standard text code/revision assigned to a component part/rev is currently inactive, and the **Active** check box in Manage Standard Text and the **Autoload** check box on the Assigned Standard Text subtask of Manage Parts are both not selected, the component standard text code/revision will not be loaded in the copied BOM.

Initiate PO and PR from Manage Subcontracts

Costpoint now allows you to initiate a purchase order/purchase requisition (PO/PR) from the Manage Subcontracts screen and have Subcontract data default in when you enter a subcontract ID.

You can do this by initiating the Purchase Order or Purchase Requisition from Manage Subcontracts and linking the PO/PR records to a subcontract record using the **Subcontract ID** field of the new Subcontract Information tab on the Manage Purchase Requisitions and Manage Purchase Orders screens. Upon linking, Costpoint then updates the subcontract record in Manage Subcontracts with the details entered in the PO/PR screens.

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

The following screens have been updated for this feature.

Manage Purchase Requisitions (PPMNTRQ1)

You can now link a requisition record to a subcontract record in Manage Subcontracts using the new Subcontract Information tab on this screen. For new requisitions, you can link the requisition record to an existing subcontract record that can be accessed using the **Subcontract Name** field. When you enter (or modify, in the case of an existing requisition) a subcontract ID, the **Subcontractor Agreement** check box on the Header tab is automatically selected, while the following information are loaded by default and cannot be modified: US citizenship required, vendor, and preferred vendor.

Note: If you need to edit the vendor value, you can do so on the Manage Subcontracts or Manage Vendors screens.

In the requisition line, when you enter or modify the subcontract ID, the following values are loaded by default: **US Citizenship Required**, **Preferred Vendor**, and **Period of Performance Start/End Dates**.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

You can now link a requisition record to a subcontract record in Manage Subcontracts using the new Subcontract Information tab on this screen. For new requisitions, you can link the requisition record to an existing subcontract record that can be accessed using the **Subcontract Name** field. When you enter (or modify, in the case of an existing requisition) a subcontract ID, the **Subcontractor Agreement** check box on the Header tab is automatically selected, while the following information are loaded by default and cannot be modified: US citizenship required, vendor, and preferred vendor.

Note: If you need to edit the vendor value, you can do so on the Manage Subcontracts screen.

In the requisition line, when you enter or modify the subcontract ID, the following values are loaded by default: **US Citizenship Required**, **Preferred Vendor**, and **Period of Performance Start/End Dates**.

On the Assign PO and Assign PO-Combined subtasks, when you enter the subcontract ID, the following values are loaded by default from the subcontract record: Vendor, US Citizenship Required, and subcontractor agreement PO type. Costpoint also validates the requisition's subcontract ID against the PO's subcontract ID.

Apply PO Info to Purchase Requisitions by Line (PPMRQLN)

When you do a PO/Release lookup for a requisition associated to a subcontract record, Costpoint will display records that match the vendor of the subcontract record. For new lines, as well as autoloading lines, US citizenship required, vendor, and subcontractor agreement PO type values are loaded by default. Costpoint also validates the requisition's subcontract ID against the PO's subcontract ID. If you need to modify the vendor, you can do this on the Manage Subcontracts or Manage Vendors screens.

For requisition lines linked to different subcontract records, Costpoint splits these into several POs based on the subcontract ID, even if these records have the same vendor.

Approve Purchase Requisitions (PPMRQAPX)

You can now access the subcontract record associated with a requisition by clicking the subcontract ID in the **Subcontract** field. The link takes you to the subcontract record on the Manage Subcontracts screen.

This change also applies to the following screens:

- Approve Purchase Requisition Lines (PPMRQAPL)
- Assign Purchase Requisitions to Buyers (PPMBUYAS)
- Assign Purchase Requisition Lines to Buyers (PPMBUYAL)

Note: This field is available only if you are licensed for Contract Management.

Manage Purchase Order Header Information (PPMPOHDR)

You can now access the subcontract record associated with a purchase order by entering the subcontract ID in the new **Subcontract ID** field. When you enter the subcontract ID, it automatically populates the new **Subcontract Name** field, which links to the subcontract record. You can click the link in the **Subcontract Name** field to access the subcontract record in Manage Subcontracts.

When you enter a subcontract ID, Costpoint automatically loads the default values for the vendor, NAICS code, and period of performance starting/ending date.

Upon save, Costpoint validates the default vendor to ensure that it's not a payroll vendor, is active, and has an approved status.

Create Purchase Orders (PPPGPO)

When you create a new purchase order using previously planned PO header information, Costpoint now copies the subcontract ID from the requisition or PO header to the PO.

View Purchase Requisition Status (PPQRQSTS)

You can now access the subcontract record associated with a requisition by clicking the subcontract ID in the **Subcontract** field. The link takes you to the subcontract record on the Manage Subcontracts screen.

Manage Request for Quotes by Item (PPMRFQI)

On the header and the child table window (CTW), a new **Subcontract** field has been added to display the subcontract ID linked to the requisition. Click the new **Subcontract** field to access the subcontract record in Manage Subcontracts.

When you enter a new item associated with a subcontract, Costpoint loads the vendor and vendor information and makes the **Vendor** field unavailable. Upon save, Costpoint validates the default vendor to ensure that it's not a payroll vendor, is active, and has an approved status.

If the requisition corresponding to the subcontract has the **Subcontractor Agreement** check box selected, the RFQ's **Subcontractor Agreement** check box follows suit and will be disabled; otherwise, the RFQ's **Subcontractor Agreement** check box is cleared and can be edited.

When you do a lookup, Costpoint displays RFQs with vendors matching that of the subcontract (if loaded). The lookup also includes RFQs without any subcontract reference. When you enter an RFQ vendor and it does not match the subcontract vendor and US citizenship requirement, Costpoint will display an error.

Manage Request for Quotes by Vendor (PPMRFQV)

On the header and the child table window (CTW), a new **Subcontract** field has been added to display the subcontract ID linked to the requisition. Click the new **Subcontract** field to access the subcontract record in Manage Subcontracts.

When you enter a new record for a requisition with a subcontract, Costpoint loads the associated vendor and other vendor-related information, and makes the **Vendor** and **US Citizenship** fields unavailable. Upon save, Costpoint validates the default vendor to ensure that it's not a payroll vendor, is active, and has an approved status.

For existing records, you can change the previously saved requisition as long as the request for quote vendor and US citizenship requirement of the requisition matches the new subcontract.

The requisition record corresponding to the subcontract follows after the **Subcontractor Agreement** check box of the record, whether it is selected (unavailable) or cleared (editable).

Manage Vendor Quotes by Item (PPMQTI)

On the header and the child table window (CTW), a new **Subcontract** field has been added to display the subcontract ID linked to the requisition. Click the new **Subcontract** field to access the subcontract record in Manage Subcontracts.

When you enter a new record for a requisition with a subcontract, Costpoint loads the associated vendor and other vendor-related information and makes the **Vendor** and **US Citizenship** fields unavailable. Upon save, Costpoint validates the default vendor to ensure that it's not a payroll vendor, is active, and has an approved status.

The **Subcontractor Agreement** check box is selected and editable if there is no RFQ reference. If an RFQ exists in the header, the subcontractor agreement option loads the default value to the subcontractor agreement selection for the RFQ. For existing records, you can change the previously saved requisition as long as the request for quote vendor and US citizenship requirement of the requisition matches the new subcontract.

Manage Vendor Quotes by Vendor (PPMQTV)

On the header and the child table window (CTW), a new **Subcontract** field has been added to display the subcontract ID linked to the requisition. Click the new **Subcontract** field to access the subcontract record in Manage Subcontracts.

When you enter a new record for a requisition with a subcontract, Costpoint loads the associated vendor and other vendor-related information and makes **the Vendor** and **US Citizenship** fields unavailable. Upon save, Costpoint validates the default vendor to ensure that it's not a payroll vendor, is active, and has an approved status.

The **Subcontractor Agreement** check box is selected and editable if there is no RFQ reference. If an RFQ exists in the header, the subcontractor agreement option defaults to the subcontractor agreement selection for the RFQ. For existing records, you can change the previously saved requisition as long as the request for quote vendor and US citizenship requirement of the requisition matches the new subcontract.

Manage Purchase Orders (POMMAIN)

You can now link a purchase order (PO) record to a subcontract record in Manage Subcontracts using the new Subcontract Information tab on this screen. For new purchase orders (PO), you can link the PO to an existing subcontract record that can be accessed using the **Subcontract Name** field. When you enter (or modify, in the case of an existing requisition) a subcontract ID, the **Subcontractor Agreement** check box on the Header tab is automatically selected, while the following information are loaded by default and cannot be modified: US citizenship required, vendor, and preferred vendor.

Note: If you need to edit the vendor value, you can do so on the Manage Subcontracts screen.

In addition, this screen has been updated so that when you enter/modify the subcontract ID, the default values for the **US Citizenship Required**, **Vendor**, and **Period of Performance Start/End** fields are loaded and become unavailable (PO header and PO line). The default PO type (subcontractor agreement) is also loaded but remains editable.

For POs generated from a requisition with subcontract reference, the **Subcontract ID** field cannot be edited. Upon save, Costpoint validates the vendor to ensure that the vendor is not a payroll vendor, is active, and has an approved status.

Manage Buyer Actions (POMBACT)

A new **Subcontract** field has been added to display the subcontract ID linked to the PO/Rlse. Click the **Subcontract** field to access the subcontract record in Manage Subcontracts.

Import Purchase Orders (AOPUTLPO)

The following are the changes to the Import Purchase Orders screen, with the condition that a subcontract ID exists on the PO header:

- For a new PO, if a Subcontract ID is in the input file:
 - Load the vendor associated with the subcontract on the PO vendor, overriding the input file vendor.
 - Load the US Citizenship Required flag (Y/N) associated with the subcontract in the similar field in PO header and PO lines.
 - Load the Period of Performance Start/End Dates associated with the subcontract into similar fields in PO header and PO lines.
 - Load PO Type = Subcontractor Agreement ("A"), but only if no value is provided in the input file.
- For an existing PO with no action done (no receipts, vouchers, or blanket releases), if a Subcontract ID is in the input file, it will replace any existing Subcontract ID, along with associated vendor, US Citizenship Required flags, Period of Performance Start/End dates, and PO type (if no value is provided in the input file).
- For an existing PO with some action done (receipts, vouchers, or blanket releases exist), PO vendor and other flags cannot be changed, so if a Subcontract ID is in the input, it will be ignored.

Import Purchase Requisitions (AOPRQPP)

A new **Subcontract ID** column has been added in the input file to load requisition subcontract information. For new requisitions with a subcontractor ID in the input file, Costpoint loads the following, overriding any input file values:

- The vendor associated with the subcontract in the preferred **Vendor** field on the requisition line
- US Citizenship Required (Y/N) into similar flags at the Requisition header and line
- Period of Performance Start/End dates into similar fields on the Requisition line (ignoring any input file values)

In addition, Costpoint uses the subcontractor agreement flag value in the input file. However, if the input file does not have a subcontractor agreement flag value, but the header has subcontractor ID, the subcontractor agreement is set to Y by default.

Import Vendor Quotes (AOPQTV)

The Import Vendor Quotes screen has been updated so that when an input file has an RFQ with a requisition reference that is associated with a subcontract ID (RQ_HDR.SUBCNTR_ID), the Vendor column name becomes optional because the process will automatically use the vendor associated with the subcontract instead of the input file value.

Create Journal Entries from Standard Costing Updates

This enhancement allows 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).

The following screens have been updated for this feature.

Set Up Company (SYPCOMP)

This screen now copies the values of the new **Standard Cost Updates** group box on the Configure Product Definition Settings screen from the original company when you create a new company and copy the settings from an existing company.

Configure Product Definition Settings (PDMITMRU)

You can now indicate updates to standard costing using the new **Standard Cost Updates** group box.

This new group box has the following check boxes:

- **Create Cost Adjustment Transactions:** Use this check box to create cost adjustment transactions for the inventory quantities. This option defaults in the applications where standard cost adjustments can be made (manually or by a process). If selected, cost adjustments will be automatically created for the updates made to standard costs for projects that use standard costing and on screens where this option is available.
- **Do Not Post to General Ledger:** Use this check box to prevent the created cost adjustment transactions from posting to the general ledger. This option is available if you opted to create cost adjustment transactions. This option defaults in the applications where standard cost adjustments can be made (manually or by a process).

Update Buy Part Standard Cost (PDPBSCST)

This screen has the following new check boxes:

- **Create Cost Adjustment Transactions:** Use this check box to create cost adjustment transactions for the inventory quantities of standard cost projects. This check box defaults to the option selected in Configure Product Definition Settings.
- **Do Not Post to General Ledger:** Use this check box to prevent the created cost adjustment transactions from posting to the general ledger. This option is available if you opted to create cost adjustment transactions.

This application now creates a cost adjustment inventory transaction to reflect the inventory value. In addition, you can now generate a supplement report to the Update report to see the impact of the standard cost change on inventory balances.

Note: You will encounter an error if the following occur:

- If you select the Print/Update Buy Part Standard Cost option and adjustment account/orgs for common and allocated inventory is not specified in Configure Inventory Accounts for the logged-in company.
- If an employee ID is not associated with the user who is creating the cost adjustment transactions for the cost updates.

Update Make Part Standard Cost (PDPMSCST)

This screen has the following new check boxes:

- **Create Cost Adjustment Transactions:** Use this check box to create cost adjustment transactions for the inventory quantities of standard cost projects. This check box defaults to the option selected in Configure Product Definition Settings.

- **Do Not Post to General Ledger:** Use this check box to prevent the created cost adjustment transactions from posting to the general ledger. This option is available if you opted to create cost adjustment transactions.

This application now creates a cost adjustment inventory transaction to reflect the inventory value. In addition, you can now generate a supplement report to the Update report to see the impact of the standard cost change on inventory balances.

Manage Parts (PDMPART)

These new check boxes have been added on the Project Item Costs and Item Costs subtasks:

- **Create Cost Adjustment Transactions:** This check box defaults to the option selected in Configure Product Definition Settings. If this is selected, Costpoint automatically creates cost adjustment transactions for each affected part/revision/inventory abbreviation when standard cost updates are processed and saved.
- **Do Not Post to General Ledger:** This option is available if you opted to create cost adjustment transactions. If this check box is selected, the created cost adjustment transactions will not be posted to the general ledger.

When you select **Standard** on these subtask, the Std Cost Inventory Impact subtask becomes available. The Std Inventory Impact subtask displays the total value of inventory that will be affected by the manual change to the standard cost for a particular project and follows the following conditions:

- This only applies to standard cost rows.
- If multiple rows exist for a particular project, apply this logic only to the currently effective row.
- It will not include in the calculation the impact for rows that are currently ineffective.
- It will display the impact to inventory before saving the change.
- It will only include an inventory row if the calculated impacted quantity is not equal to zero.
- It will display information if the cost is changed.
- After saving a modified cost and querying back the record, the subtask will not display any information until another cost change is made.

These changes also apply to the following screens:

- Manage Item Costs (PDMCOST)
- Manage Project Item Costs (PDMPRJCS)

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 the 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](#).

The Procurement dashboard in CBI has three tabs: Purchasing, Requisitions, and Requisition to PO Conversion.

The Purchasing tab displays the following charts:

- Total value spent on procurement: Use this chart to see all the total purchases by purchase order (PO) types.
- Number of active vendors: Use this chart to see the count or total number of vendors with Active status per Company ID.
- Spend by commodity: Use this chart to see all the total purchases of the vendor by commodity. Lines without commodity will be included in a separate Null bucket, and you can choose to remove this filter.
- Purchase orders (PO) status by supplier: Use this chart to see POs that are not yet fulfilled by the vendor.

The Requisitions tab displays the following charts:

- Requisitions awaiting approval by approver: Use this chart to see requisitions that are In-Approval by current approver and allow for action to be taken to move the requisitions through the pipeline.
- Requisition status by requisitioner: Use this chart to see a count of requisition status by requisitioner.

The Requisition to PO Conversion tab displays the following chart:

- Approved requisitions awaiting PO conversion by buyer: Use this chart to see the number of requisitions that have been approved but are awaiting conversion to a PO.

The Manufacturing dashboard in CBI displays the following charts:

- Manufacturing Order (MO) production status: Use this chart to see the count or total number of MOs per status.
- MO cycle time: Use this KPI to see the average number of days it takes in a phase for MOs.
- MO planned date vs. actual date: Use these KPIs to see the planner performance by comparing planned dates vs. actual dates for both Release and In-Shop.
- ECN Status: Use this chart to see ECNs in each open status and utilize the detailed drill through report to see Manufacturing Orders that may be impacted by an ECN for any build part or component part.

Exclusion List Warning

This new feature alerts 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 displays if the selected vendor is on the exclusion list. You can then decide whether or not to continue with that vendor for that transaction.

Apply PO Info to Purchase Requisitions (PPMNTRQ2)

When you enter/select a vendor that is included in the Denied Party List, Costpoint displays this warning message:

This Vendor XXX is on the Exclusion List in SAM.gov.

Type: VEND_EXCLS.EXCLS_TYPE description Active

Date: VEND_EXCLS.EXCLS_ACTIVE_DT Termination

Date: VEND_EXCLS.EXCLS_TERM_DT Last Updated

Date: VEND. LAST_GWIQ_SYNCH

This change also applies to the following screens:

- Apply PO Info to Purchase Requisitions by Line (PPMRQLN)
- Manage Purchase Order Header Information (PPMPOHDR)
- Manage Purchase Orders (POMMAIN)
- Create Purchase Order Change Orders (POMCHNG)
- Manage Vendor Quotes by Vendor (PPMQTV)
- Manage Vendor Quotes by Item (PPMQTI)
- Manage Request for Quotes by Vendor (PPMRFQV)
- Manage Request for Quotes by Item (PPMRFQI)
- Approve Pending Purchase Orders (POMSTAT)
- Manage Vendor Returns (RCMRTRN)

Create Blanket Purchase Order Releases (POMRELS)

When the vendor associated to the blanket purchase order (PO) that you entered/selected is included in the Denied Party List, Costpoint displays this warning message:

This Vendor XXX is on the Exclusion List in SAM.gov.

Type: VEND_EXCLS.EXCLS_TYPE description Active

Date: VEND_EXCLS.EXCLS_ACTIVE_DT Termination

Date: VEND_EXCLS.EXCLS_TERM_DT Last Updated

Date: VEND. LAST_GWIQ_SYNCH This Vendor XXX is on the Exclusion List in SAM.gov.

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

Option to Default Estimate to Complete Percent

This enhancement provides you with the option to use a default Estimate to Complete Percent value other than zero when creating manufacturing order (MO) partial reliefs. Not entering a value can cause an MO Costing error. 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.

Configure Manufacturing Order Costing Options (PCMCSTOP)

You now have an option to default estimate-to-complete percent value when creating manufacturing order partial reliefs. You can do this by entering the default ETC percentage in the new **Default ETC %** field.

Enter Manufacturing Order Reliefs (PCMRELMO)

This screen now retrieves the default value from **Default ETC %** of the Configure Manufacturing Order Costing Options screen.

Set Up Company (SYPCOMP)

When you create a new company, the application will now include the new **Default ETC %** field from the Configure Manufacturing Order Costing Options screen.

Add Revenue Recognition Field to the SO Approval Process

This enhancement allows 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.

Approve Sales Orders (OEMAPPSO)

You can now view the revenue recognition method on the SO details section.

Add New Input File Fields to PO Preprocessor in Import Purchase Orders (AOPUTLPO)

This enhancement allows 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 allows 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.

Reconcile Inventory Balances (INPRECON)

You can now reconcile inventory serial/lot quantity to location detail quantity on the Reconcile Inventory Balances screen by selecting the new **Reconcile Serial/Lot Qty** check box. This check box is enabled when you select the **Reconcile Inv Summary and Detail Qty to Transaction History** option and **Enable Inventory Serial/Lot Tracking** is selected on the **Configure Serial/Lot Settings** screen

This update is based on the current serial/lot tracking requirements at the part/project level (based on setup) or just the part level. Transactions with mismatched tracking requirements will be included in the exclusion report and will not be included in the calculations.

There are multiple reports which show discrepancies between various tables. These reports are:

- Report 1: This report displays the quantity mismatch between INVT_TRN_LN compared to INVT_TRN_LN_SR_LT. It can be viewed as sorted by Project or by Part/Rev.
- Report 2: This report displays the quantity mismatch between INVT_TRN_LN_SR_LT compared to INVT_WHS_LOC_SR_LT. It can be viewed as sorted by Project or by Part/Rev.
- Report 3: This report displays the quantity mismatch between INVT_TRN_LN_SR_LT compared to INVT_WHS_LOC_SR_LT. It can be viewed as sorted by Project or by Part/Rev.
- Exclusion Report: This includes transaction lines that are excluded from the reconciliation process due to mismatch of serial/lot tracking requirements. It also includes transactions with the same combination of part/rev/inv abbrev as mismatched tracking transactions.

- Unreconciled Transactions Report: This includes transactions that are included in the reconciliation process but which could not be reconciled by the system due to various reasons, as noted in the report.

Full Requirements Subtask and Order Reference Field to Requirements Subtask

You can now use the new Full Reqmts subtask to 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 MOs subtask.

View Part Inventory

You can now use the new Full Reqmts subtask added to the following screens to view all requirements identified by the Materials Requirement Planning (MRP) process:

- View Part Inventory (INQPINV)
- View Part Inventory (MRQPINV)
- View Part Inventory (MSQPINV)
- View Part Inventory (PCQPINV)

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 MOs subtask.

Time & Expense

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

Improved Integration of Co-Deployed Installations

Integration between Costpoint and Time & Expense has been improved for co-deployed installations so that you are no longer required to export/import the following links:

- **Link 12:** UDT01/UDT02 (Account/Project or Account/MO)
- **Link 19:** UDT01/UDT09 (Account/Org)
- **Link 27:** UDT02/UDT07 (Project/PLC or MO/Routing)
- **Link 29:** UDT02/UDT09 (Project/Org)

The links are named for the UDTs being linked. For example, Link 12 is UDT01 linked with UDT02.

Note: The terms shown above in parentheses (Account/Project, for instance) represent the standard labels frequently applied to UDTs throughout Costpoint and Time & Expense, but these terms can vary by company because the labels are customizable. Therefore, for documentation purposes, the UDT numbers are used instead of the standard terms throughout these release notes.

No changes are required to use this enhancement if your systems are co-deployed, and if direct linking of UDTs is already enabled. However, to populate the new Link tables the first time, you must run the export from the **People » Labor » Timesheet Interface » Export Data to Deltek Time and Expense** screen.

Note: Direct linking can be confirmed from the **Links** section of the UDT Options tab in **Time & Expense » Configuration » General Controls » General Settings**. Each of the above listed links will be configured as either Direct, Wildcard, or None. The link is direct, if Direct is already selected.

Because linked UDTs now display directly from Costpoint, subtasks related to direct linking on the **Time & Expense » Configuration » Master Data** screens are no longer editable.

For example, if **Link UDT01/UDT02** is configured as Direct, then in **Configuration » Master Data » UDT02**, the **New** and **Delete** buttons were removed from the UDT01 Links subtask, and edits need to be applied directly to the appropriate area within Costpoint instead.

Note: If your version of Time & Expense is *not* co-deployed with Costpoint and you want to create an export file, you must select **Create CSV Export Files for Link Tables** on the Export Information tab of the **People » Labor » Timesheet Interface » Export Data to Deltek Time and Expense** screen.

Subtask Usability Improvements

Other changes associated with this enhancement include the conditional display of subtasks on the **Configuration » Master Data** screens based on the Link option selected on the UDT Options tab of **Configuration » General Controls » General Settings**.

For example, if **Link UDT01/UDT02** is configured as Direct, then in **Configuration » Master Data » UDT02**, the subtasks related to wildcards (UDT01 Wild Card Links, for instance), do not display. Conversely, if the link is configured as Wildcard, then subtasks related to direct links (UDT01 Links, for instance) do not display. Neither type of subtask displays if the link is configured as None.

Prior to this usability improvement, all of the subtasks displayed regardless of configuration, even if the subtasks were not editable.

New Mastercard Import and Related Updates

The Batch Expenses area was enhanced to include a new MasterCard batch type that automates the process of importing MasterCard expense transactions.

The import is based on the Common Data Format 3 (CDF3) file, and all imported account numbers are tokenized to protect privacy. The MasterCard transaction codes are automatically mapped to the various expense wizards, and once imported, the expenses are available to employees in My Outstanding Expenses and Expense Report.

Although the Mastercard import is new, the process for configuring the batch type and importing the transactions is accomplished from existing Batch Expense applications.

If you are not already familiar with setting up and maintaining batch types and importing expenses, see online help for applications under **Time & Expense » Expense » Batch Expenses**.

The following sections describe differences specific to the Mastercard import as well as new functionality that has been applied to both MasterCard and Visa.

Updates to Expense Batch Types

The **Expense » Batch Expenses » Expense Batch Types** application now provides an option for configuring a batch import for Mastercard expense transactions.

To create a MasterCard batch type, select Mastercard from the **Source** drop-down list on the Basic Information tab.

Miscellaneous interface updates to this application include:

- The source type (Mastercard or Visa) is dynamically added as a prefix to some field and subtask names.
- Subtasks that do not apply to the selected source type are now hidden. For example, when Mastercard is selected as the source, the Wizard Type Identification subtask is hidden, because it applies only to Visa.

Updates to the Transaction Type Filter Subtask

The Transaction Type Filter subtask was updated so that all the available transaction codes now load automatically if the table is empty when you save the record.

If you want only a select number of transaction codes, you can add a new record to the table and select the code using lookup, or if the record has been saved and all the codes are preloaded, you can delete the codes instead.

Note: This change applies to Visa as well. Note also that due to the change in the underlying functionality, the **Load All** button was removed from the subtask.

Note also that on this and other screen subtasks, the **Close** button was changed to **Apply**, which functions to save any changes you have made on the subtask. The **Copy** button was also removed from any subtask where the function is not applicable.

Updates to Batch Expenses

When you import Mastercard transactions in **Expense » Batch Expenses » Batch Expenses**, the file is validated to ensure that it only includes tokenized account numbers. If the file includes account numbers beginning with the number 5, you receive a processing error.

The Batch Expenses table was updated with following field changes:

- **Ghost Card:** This check box was added to make it easier to designate a Transaction ID as belonging to either a ghost card or to an employee. See below for details.
- **Employee and Pay Method:** These check boxes were removed because the functionality was changed. See below for details.
- **Cardholder Name:** This is a new read-only field that displays the cardholder name information available from the Mastercard file.

Note: System Administrators: See also [“Check for Duplicate Expenses during Import”](#) to learn more about a configuration setting added to this screen.

Identify Transactions as Ghost Cards

A **Ghost Card** check box was added to the Batch Expense table (in Form View, the check box displays on the General tab). For any transaction, select this setting to designate the card number associated with the transaction as a ghost card. In future imports, the check box is selected by default.

Note: After you save the import file, the tokenized card number is also added to the list of ghost cards maintained in the Ghost Card Identification Values subtask in **Expense » Batch Expenses » Expense Batch Types**.

If the transaction is associated with an employee name and **Ghost Card** is not selected, the tokenized card number and pay method are now automatically added to the Pay Method subtask in **Configuration » Resources » Resource Information** for that employee after you save. If the account number already exists on the resource record, the record is not updated.

Because the update to the resource record is automatic based on the status of **Ghost Card**, the **Pay Method** and **Employee** check boxes were removed from the screen.

Note: The new **Ghost Card** check box and functionality is also valid for Visa, but for Amex the check box is dimmed, and it is hidden for Manual and Generic batch types.

Related Updates to Other Applications

After the import is complete, certain field values are copied to other applications as described below.

Expense Report and My Outstanding Expenses

The value in the **Merchant** field of the Batch Expense table will populate the new **Merchant Name** field in the following applications:

- **Expense » Expense Reports » Expense Report:** The merchant information from the import displays in Outstanding Expenses. The value, however, does not populate in the expense itself.
- **Expense » Expense Reports » My Outstanding Expenses:** The merchant information displays in the table along with other imported expense details.

It also populates the **Merchant Name** field in the Mobile version of Expense Report.

This change applies to import types (Mastercard, Visa, and AMEX, as well as generic).

Manage Resource Info - Import Mastercard Credit Card Transactions

If applicable, the Pay Methods subtask in **Configuration » Resources » Resource Information** is updated to include the following information:

- Mastercard Employee ID
- Mastercard Account ID
- Mastercard Effective Date

Note: This functionality is also described in the “Identify Transactions as Ghost Cards” section above.

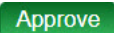

Approval Role Enhancement

To improve the user experience associated with managing and approving expense authorizations and expense reports, various interface updates were made to the following applications:

- **Expense » Expense Authorizations » Manage/Approve Expense Authorizations**
- **Expense » Expense Reports » Manage/Approve Expense Reports**

These updates include:

- The contents of the Workflow subtask automatically display when the application is opened.
- Two buttons were renamed:

Old Button Name	New Button Name
Perform Selected Task	 Approve
Reject Selected Task	 Reject

- For approval tasks, only the **Approve** and **Reject** buttons are enabled.
- For record attachment tasks, only the **Attach**, **Missing**, **View**, and **Unrecord Attachment** buttons are enabled.

New Application for Managing Attachments

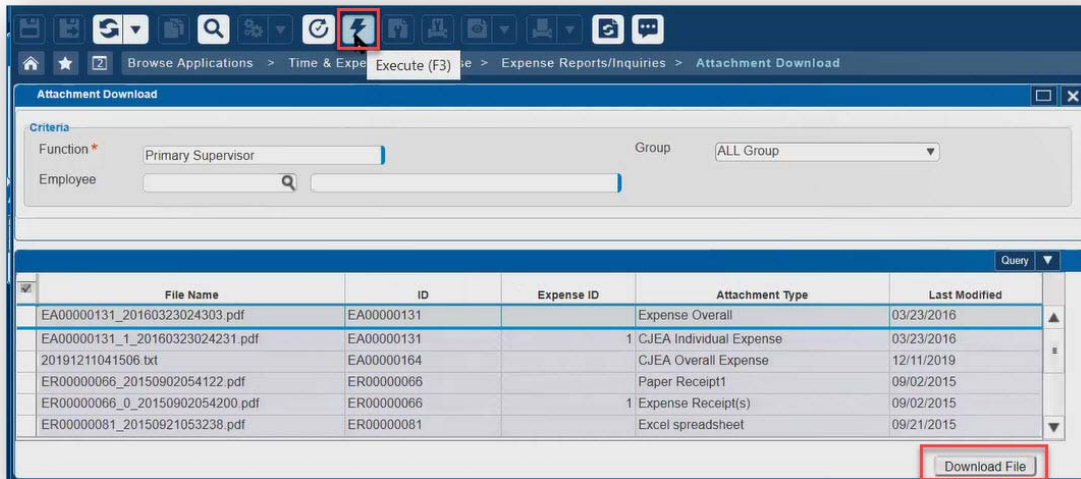
An Attachment Download application was created that enables users with an assigned functional role (for example, Primary Supervisor) to view and download attachments that members of their assigned groups have uploaded to expense reports and expense authorizations, eliminating the need to open individual expense reports or expense authorizations to view them.

This application was created for users whose functional role includes access to the expense reports and authorizations of other individuals.

Attention System Administrators: In addition to application rights, users also require access to the Alternate File Location, where attachments are currently stored, as well as locations where attachments have been previously stored.

Time & Expense

Following assignment of application rights, click **Expense » Expense Reports/Inquiries » Attachment Download** to display the report.




To run the report, complete the following fields and actions:

Field	Description
Function	<p>This field defaults to your functional role. If more than one role is available to you, the roles are listed in alphabetical order. Click to choose a different role.</p> <p>This field value is the primary filter for the report and determines the values that populate the Group and Employee lists.</p>
Group	<p>This drop-down list displays the resource groups available to the functional role you selected. The default value is All.</p> <p>When you run the report based on All, the results include all the attachments for every member of every group assigned to the functional role you selected.</p> <p>If you have access to only a single group, All remains the default value and is the only option listed.</p> <p>If more than one group is available to you, click to filter the results by that group.</p>
Employee	<p>Use this optional field to return attachment results for a specific employee. The list of employees is based on the values selected in the Function and Group fields. Click to select the employee.</p>
Execute	<p>Click on the toolbar to run the report.</p> <p>This field is disabled if you have Browse rights only.</p>

Field	Description
Download File	<p>This button enables after you select an attachment in the table. Click it to download the selected file.</p> <p>This field is disabled if you have Browse rights only.</p>

Results Table Values

After you click , the results of the query display in the report table, which includes the following information about each attachment:

Column Name	Description
File Name	<p>This field displays the file name given to the attachment. The attachment could be an overall attachment, an item that was manually attached to a claimed expense, or an item added from the My Outstanding attachments application.</p> <p>The filename includes the following information:</p> <ul style="list-style-type: none"> Expense report or authorization ID, or if it was uploaded from Outstanding attachments, "outstandingatt" displays instead Expense ID if the attachment was for a claimed or planned expense Date/Time stamp (YYYYMMDDHHMMSS) File extension <p>For example, the filename for a receipt attached to a claimed expense might display as follows: ER00000654_1_20190102153551.pdf</p>
ID	This field displays the ID of the expense report or authorization.
Expense ID	This field displays the line number for the individual attachment on the expense report or authorization. If the field is blank, then the item was uploaded as an overall attachment to the report or authorization.
Attachment Type	This field describes the attachment type, for example, "Overall" or "Expense Receipt," as defined in the Attachments subtask in Expense Report » Configuration » General Settings » General Controls .
Last Modified	This is the date the attachment was added or last saved.

New My Outstanding Expenses Application

The Expense module includes a new My Outstanding Expenses application that enables you to manage your outstanding expenses from a single location. This includes expenses imported from a credit card batch feed, ones added in Costpoint Mobile T&E, or those you manually add from the application itself.

From My Outstanding Expenses, you can:

- Add new expenses and upload receipts or other attachments to them.

If your System Administrator enables Intelligent Character Recognition (ICR) processing, the first receipt you upload to a new record is scanned for expense information that can be extracted to prepopulate certain fields on the form, such as the amount or date of the expense. See [“Fields Mapped for ICR Processing”](#) below for more information.

- Upload multiple attachments to an expense.

The ability to attach multiple items to an expense record is also new for this release. See the [“Enhanced File Attachment”](#) release notes for additional information about this enhancement.

- Edit and/or delete manually added expenses.
- View expenses imported from a credit card batch feed and if needed, upload attachments.

Note: Attachments uploaded to expenses imported from a credit card feed are not processed by ICR.

- Manage uploaded attachments. See [“My Outstanding Attachments Subtask”](#) below.
- Resolve duplicate expenses if they occur. See [“Duplicate Expenses”](#) below.

The expenses you add in My Outstanding Expenses become available in the Expense Report application. When you select the expense, all the existing details and attachments are automatically loaded to the expense report. See [“Claim Manual Expenses”](#) below for more information.

Attention System Administrators: Manage Outstanding Expenses is available to any user who is assigned rights to the Expense Report application. However, before first use, you must add a new manual batch type. See [“System Administrator Configuration Tasks”](#) below.

Process Overview

To open the application, do one of the following:

- Click **Time & Expense » Expense » Expense Reports » My Outstanding Expenses**.
- Select an existing outstanding expense in the Outstanding Expenses section of either the Costpoint Home Dashboard or My Desktop in Time & Expense.

For the purpose of the following examples, assume that the ICR capability is enabled, and that the application was opened from the menu, not by opening an existing outstanding expense.

In the following example, no outstanding expenses yet exist. In this case, click **Upload Receipts** to add expense details the existing, blank record.

Time & Expense

Note: If expense records already exist in the table, you must click **New** to upload a receipt to a new expense. If you click **Upload Receipts** on an existing record, the attachment is applied to that record.

In the File Upload dialog box, click **Choose File** to navigate to the drive where the file is located. In the example image below, an image file for a meal expense was selected.

The 'File Upload' dialog box has a title bar with a close button. It contains two input fields: 'File Name*' with a 'Choose File' button and the text 'Meal.jpg', and 'Description' which is empty. At the bottom are 'Upload' and 'Close' buttons.

After processing, certain details are extracted from the image and added to the expense. For example:

The screenshot shows the 'My Outstanding Expenses' table with the following data:

Wizard Type *	Expense Date *	Personal	Hide	Pay Method *	Transaction Currency *	Amount *	Taxes	Merchant
Meals	03/31/2019	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	220.00	0.25	Cinema '76 Anonas

Below the table is the 'My Outstanding Attachments' section with the following data:

File Name	Last Modified
outstandingatt_Meal20200707005136.jpg	

The next image below is the same as above but is in Form view to better show all the expense details that were extracted after ICR processing.

The form view displays the following details:

- Basic Information**
 - Identification**
 - Batch ID: MANUAL
 - Batch Type: manual
 - Transaction ID: 8059C240-923B-40F5-9D2B-F55E7FFEC601
 - General**
 - Expense Report Type: -None-
 - Expense Type: [Empty]
 - Wizard Type: Meals ☐ Personal
 - Expense Date: 03/31/2019 ☐ Hide
 - Pay Method: Cash
 - Transaction Currency: US Dollar (USD)
 - Amount: 220.00
 - Taxes: 0.25
- Details**
 - Provider: [Empty]
 - Merchant: Cinema '76 Anonas
 - Comments: [Empty]


Time & Expense

For a list of fields that are currently mapped for extraction, see [“Fields Mapped for ICR Processing”](#) below.

In addition to correcting and completing fields, you can also upload additional attachments, if needed. Click **Upload Receipts** for each attachment you want to add. Note, however, that only the first attachment is scanned by the ICR process. Attachments display in the subtask table. For example,

The screenshot shows the 'My Outstanding Expenses' form. At the top, there is a 'New' button and a 'Delete' button. Below this is a 'Upload Receipts' button. The main table has columns: Wizard Type, Expense Date, Personal, Hide, Pay Method, Transaction Currency, Amount, Taxes, Provider, Merchant, Departure Date, Return Date, and Tick. The first row shows 'Meals' for '03/31/2019' with a 'Cash' payment method, 'US Dollar (USD)' currency, and an amount of '220.00'. Below the main table is a subtask table titled 'My Outstanding Expenses > My Outstanding Attachments'. This table has columns 'File Name' and 'Last Modified'. It contains two rows: 'outstandingatt_Meal20200707013434.jpg' and 'outstandingatt_Example PDF20200707013640.pdf'. A red box highlights these two rows. At the bottom right of the subtask table are 'View' and 'Replace' buttons.

Note: See [“My Outstanding Attachments Subtask”](#) below for additional information.

When you have finished, click . The saved file now displays the time and date stamp in the **Last Modified** field of the My Outstanding Attachments subtask.

This screenshot is similar to the previous one, but the 'Last Modified' column in the 'My Outstanding Attachments' subtask table is now populated with timestamps. The first row shows 'CPSUPERUSER, CPSUPERUSER (CPSUPERUSER) - Tue, 7 Jul 2020 02:02:13' and the second row shows 'CPSUPERUSER, CPSUPERUSER (CPSUPERUSER) - Tue, 7 Jul 2020 02:02:13'. A red box highlights these timestamps.

To add another expense, click **New**.

This screenshot shows the 'My Outstanding Expenses' form with a callout box pointing to the 'New' button. The callout box contains the text: 'To add another expense, you must first click New.' The rest of the form is identical to the previous screenshots.

After the new record is added to the table, click **Upload Receipt** to repeat the same process described above for the first expense.

Time & Expense

My Outstanding Expenses Next, click **Upload Receipt** to add expense details. New Delete Form Query

Upload Receipts

Wizard Type *	Expense Date *	Personal	Hide	Pay Method *	Transaction Currency *	Amount *	Taxes	Provider	Merchant
Meals	03/31/2019	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	220.00	0.25		Cinema 76 Anonas
-Select-		<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	0.00	0.00		

Continue the same process as described above for the new expense.

Fields Mapped for ICR Processing

When ICR processing is enabled, uploaded receipts are scanned for data that can populate mapped fields in My Outstanding Expenses. However, not all fields are presently mapped, and those that are, may not always populate or may populate incorrectly.

Therefore, it is important that you always review the results of each receipt scan. Refer to the table below to learn which fields are mapped or unmapped and other related information.

Note: The information below does not apply to expenses imported from a credit card batch feed. Fields that display on the form vary by expense report type. If ICR is not enabled, none populate.

Field	Mapping Status	Other Notes
Pay Method	Not mapped	This field is required.
Transaction Currency	Not mapped	This field defaults to your pay currency.
Amount	Mapped	This field is editable if it populates incorrectly.
Taxes	Mapped	This field may or may not populate.
Expense Report Type	Unmapped	The record can be saved without completing this field.
Expense Type	Unmapped	The record can be saved without completing this field.
Wizard Type	Mapped	This field may require manual entry or correction.
Expense Date	Mapped	This field defaults to the date on the receipt. If that information is not clear after processing, it defaults to the current date instead.
Provider	Mapped	This field may need to be manually updated.
Departure Date	Mapped	If the scan is unsuccessful, the field defaults to the current date.
Return Date	Mapped	If the scan is unsuccessful, the field defaults to the current date.

Field	Mapping Status	Other Notes
Ticket Number	Mapped	This field is editable if necessary.
Itinerary	Unmapped.	This field requires manual entry.
Agreement Number	Mapped	This field may require editing.
Start Date	Mapped	Possibly extracted, but if not, it defaults to the current date after you save.
End Date	Mapped	Possibly extracted and will default to today's date after you save.
Pickup Location	Mapped	This field may require editing.
Return Location	Unmapped.	This field requires manual entry.
Check In Date	Mapped	Possibly extracted and will default to today's date after you save.
Check Out Date	Mapped	Possibly extracted and will default to today's date after you save.
Location	Mapped	This field may need editing.
Room Per Night	Unmapped	Requires manual entry. It defaults to 0.0000.
Tax Per Night	Unmapped	Requires manual entry. It defaults to 0.0000.
Comments	Unmapped	This field will be empty in this application, but it does extract in Mobile Expense.
Currency	Unmapped	This field will default to your pay currency.

My Outstanding Attachments Subtask

Use the Outstanding Attachments subtask to view, replace, or delete attachments that you uploaded to an expense.

To view an attachment, select the row that contains the attachment and click **View**, and depending on the browser, the attachment may download for viewing or it may open directly in the viewer.

The replace option allows you to remove an attachment and replace it with a different one. After you select the attachment in the subtask table and click **Replace**, the Upload File dialog box opens where you can browse for the attachment you want add. The replacement process does not overwrite expense information.

Note: To add a new attachment to an expense without replacing an existing one, click **Upload Receipts** on the main table. As stated earlier, any attachments added after the first one are not scanned by ICR.

The table below describes the fields that display in the subtask table.

Field	Description
File Name	<p>When attachments are uploaded, the application modifies the file name with the following attributes:</p> <ul style="list-style-type: none"> Outstandingatt: This prefix identifies the attachment as one that was manually attached from this application. If the attachment was uploaded from a mobile device, that is indicated by a prefix of "Mobile." The original file name: This is the filename you have assigned to the attachment originally. Date/Time stamp: The date and time (including minutes and seconds) is presented using this format: YYYYMMDDHHMMSS. File extension: This identifies the type of attachment, such as .jpg or .pdf.
Last Modified	This field displays the time/date of the last update, as well as the identity of the user who made the modification.

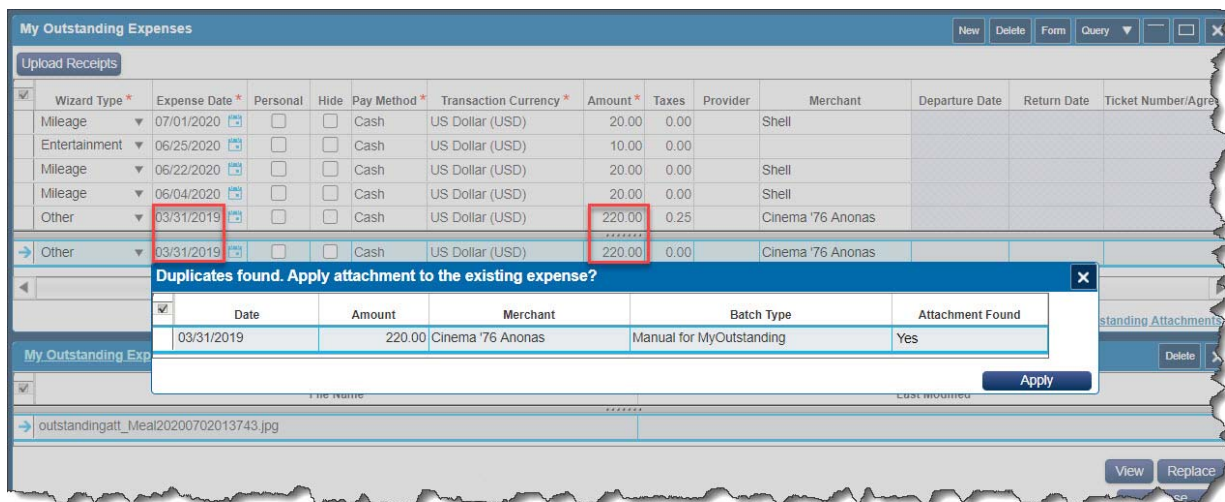
Duplicate Expenses

My Outstanding Expenses contains all of your current outstanding expenses, including those you manually create as well as ones imported from a credit card feed. Because the potential for duplicates exists, the expense date and amount of new expenses are compared to existing expenses.

Manual Expenses

When ICR processing is enabled, the check for duplicates occurs when you upload a receipt to a new record. If the expense date and amount on the receipt match an existing record, the duplicates display. You can choose to either upload the receipt to the new record or attach it to an existing one instead.

In the image below, for example, the expense date and amount on the new row match the row above it.



The duplicate record opens in a pop-up dialog box. When this happens, you can:

Time & Expense

- Click **X** to dismiss the dialog box and finish attaching the receipt to the new record.
- Click **Apply** to dismiss the new record and attach the receipt to the existing record.

Note: If multiple duplicates display, select the record to which you want to attach the receipt and click **Apply**. If one of the duplicates is an imported expense, that record is selected by default and cannot be changed.

After you click **Apply**, the receipt is added to the My Outstanding Attachments subtask of the selected record. For example:

The screenshot shows the 'My Outstanding Expenses' interface. At the top, there's a header bar with 'My Outstanding Expenses' and buttons for 'New', 'Delete', 'Form', 'Query', and a dropdown menu. Below this is a section titled 'Upload Receipts' with a table of expenses. The table has columns: Wizard Type, Expense Date, Personal, Hide, Pay Method, Transaction Currency, Amount, Taxes, Provider, Merchant, Departure Date, Return Date, and Ticket Number/Ag. The table contains five rows of expenses, all with 'Cash' as the payment method and 'US Dollar (USD)' as the currency. The last row is highlighted in blue. Below the table is a section titled 'My Outstanding Attachments' with a 'Delete' button. This section contains a table with two columns: 'File Name' and 'Last Modified'. It lists two attachments: 'outstandingatt_Meal20200702014623.jpg' and 'outstandingatt_Meal20200702015339.jpg'. The first attachment is highlighted in blue. At the bottom right, there are buttons for 'View', 'Replace', and 'Close'.

Wizard Type *	Expense Date *	Personal	Hide	Pay Method *	Transaction Currency *	Amount *	Taxes	Provider	Merchant	Departure Date	Return Date	Ticket Number/Ag
Mileage	07/01/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	20.00	0.00		Shell			
Entertainment	06/25/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	10.00	0.00					
Mileage	06/22/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	20.00	0.00		Shell			
Mileage	06/04/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	20.00	0.00		Shell			
Other	03/31/2019	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	220.00	0.25		Cinema '76 Anonas			

File Name	Last Modified
outstandingatt_Meal20200702014623.jpg	SUPERUSER, CP (CPSUPERUSER) - Wed, 1 Jul 2020 23:24:26
outstandingatt_Meal20200702015339.jpg	SUPERUSER, CP (CPSUPERUSER) - Thu, 2 Jul 2020 01:49:57

You can leave both receipts attached or select one to remove and click **Delete**. For example:

The screenshot shows the 'My Outstanding Expenses' interface. At the top, there's a header bar with 'My Outstanding Expenses' and buttons for 'New', 'Delete', 'Form', 'Query', and a dropdown menu. Below this is a section titled 'Upload Receipts' with a table of expenses. The table has columns: Wizard Type, Expense Date, Personal, Hide, Pay Method, Transaction Currency, Amount, Taxes, Provider, Merchant, Departure Date, and Return Date. The table contains one row of expenses, with 'Other' as the payment method and 'US Dollar (USD)' as the currency. Below the table is a section titled 'My Outstanding Attachments' with a 'Delete' button. This section contains a table with two columns: 'File Name' and 'Last Modified'. It lists two attachments: 'outstandingatt_Meal20200702014623.jpg' and 'outstandingatt_Meal20200703230953.jpg'. The second attachment is highlighted in blue. At the bottom right, there are buttons for 'View', 'Replace', and 'Close'.

Wizard Type *	Expense Date *	Personal	Hide	Pay Method *	Transaction Currency *	Amount *	Taxes	Provider	Merchant	Departure Date	Return Date
Other	03/31/2019	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	220.00	0.25		Cinema '76 Anonas		

File Name	Last Modified
outstandingatt_Meal20200702014623.jpg	SUPERUSER, CP (CPSUPERUSER) - Wed, 1 Jul 2020 23:24:26
outstandingatt_Meal20200703230953.jpg	SUPERUSER, CP (CPSUPERUSER) - Fri, 3 Jul 2020 23:09:13

Alternatively, if you choose to attach the receipt to the new expense instead of the existing one, a new record is created, and the duplicates are highlighted in yellow after you save. For example:

Time & Expense

My Outstanding Expenses [New] [Delete] [Form] [Query] [Filter]

Upload Receipts

Wizard Type *	Expense Date *	Personal	Hide	Pay Method *	Transaction Currency *	Amount *	Taxes	Provider	Merchant	Departure Date	Return Date
Mileage	07/03/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	20.00	0.00		Shell		
Mileage	07/01/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	20.00	0.00		Shell		
Entertainment	06/25/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	10.00	0.00				
Mileage	06/22/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	20.00	0.00		Shell		
Mileage	06/04/2020	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	20.00	0.00		Shell		
Other	03/31/2019	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	220.00	0.25		Cinema '76 Anonas		
Other	03/31/2019	<input type="checkbox"/>	<input type="checkbox"/>	Cash	US Dollar (USD)	220.00	0.25		Cinema '76 Anonas		

My Outstanding Expenses > My Outstanding Attachments [Delete]

File Name	Last Modified
outstandinggatt_Meal20200704223259.jpg	SUPERUSER, CP (CPSUPERUSER) - Sat, 4 Jul 2020 22:33:32

[View] [Replace]

In this case, options for managing the duplicates include:

- Take no action and leave the duplicates intact.
- Delete a duplicate(s) if at least one of the records includes all the required attachments. To do this, select the row or rows you want to remove and click **Delete**.
- Combine the duplicates to retain all attachments. When records are combined, the attachments from each are added to the one you designate as the primary.

To perform this action, select the records you want to combine, right-click in the first column, and click **Combine Duplicates** on the shortcut menu. For example:

Right-click context menu options:

- Combine Duplicates
- Attachments for Expenses
- Attachment for Mob. Out. Exp.

My Outstanding Attachments [Delete] [X]

File Name	Last Modified
outstandinggatt_Meal20200704005222.jpg	SUPERUSER, CP (CPSUPERUSER) - Sat, 4 Jul 2020 00:53:03

In the dialog box that opens, select one of the expenses as the primary record and click **Apply**.

Combine Duplicates. Primary must be selected. [X]

Primary	Date	Amount	Merchant	Batch Type	Attachment Found
<input checked="" type="checkbox"/>	03/31/2019	220.00	Cinema '76 Anonas	Manual for MyOutstanding	Yes
<input type="checkbox"/>	03/31/2019	220.00	Cinema '76 Anonas	Manual for MyOutstanding	Yes

[Apply]

The duplicate records are removed, and the primary record retains all the attachments:

My Outstanding Expenses > My Outstanding Attachments [Delete]

File Name	Last Modified
outstandinggatt_Meal20200704005222.jpg	SUPERUSER, CP (CPSUPERUSER) - Sat, 4 Jul 2020 00:53:03
outstandinggatt_Meal20200702014623.jpg	SUPERUSER, CP (CPSUPERUSER) - Sat, 4 Jul 2020 01:21:17

[View] [Replace]

Imported Expenses

Credit card expenses imported from a batch feed may also be checked for duplicates. Your System Administrator will configure the import to either allow duplicate expenses or to resolve them.

After transactions are posted, My Outstanding Expenses reflects the following changes:

- If duplicates are allowed, the duplicate expenses display in yellow highlighting.
You can manually combine them in favor of the imported expense, or you can leave both and choose one of them when you claim the expense in Expense Report.
- If duplicates are resolved, the duplicate expenses are automatically combined so that only the imported expense remains.

When a manual expense is combined with an imported one, the following changes occur:

- Files attached to the manual expense are copied to the imported expense.
- Empty fields on the imported expense populate with data that may exist on the manual expense.
- The manual expense is removed.

These changes happen whether the expenses are manually combined by the user in My Outstanding Expenses or automatically combined during import. Note also that existing values on an imported expense are read-only and are never overwritten.

Claim Manual Expenses

Expenses you add in My Outstanding Expenses are available to select on expense reports in the Expenses section of **Expense » Expense Reports » Expense Report**.

In Wizard mode, for example, click **Add Claimed Expense**:

Select the expense type. In this example, Meals is selected:

After you click **Continue**, all outstanding expenses for the selected expense type display, including any imported from a credit card batch feed or ones added from Mobile Expense that were not yet claimed.

In the example below, only one meal expense exists, and it was added in My Outstanding Expenses.

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The screenshot shows the 'Expense Type' sidebar on the left with options like 'Expense Type', 'Outstanding Expenses', 'Expense Details', 'Attendees Details', 'Expense Amount', 'Charge Allocations Under Ceiling', 'Charge Allocations Over Ceiling', and 'Expense Attachments'. The main area displays the 'Expense Details' tab with a table of expense data. The 'Batch Type' column is highlighted with a red box, showing 'Manual for My Outstanding Expenses'. Other columns include 'Select', 'Source', 'Transaction ID', 'Merchant', 'Date', and 'Amount'. The 'Amount' column shows '220.00 USD'. At the bottom, there are 'Exit', 'Back', and 'Continue' buttons.

The **Batch Type** field indicates the source of the expense. In the image above, it indicates that it was manually added in My Outstanding Expenses. Select the expense and click **Continue**.

To save the expense, other required fields must be completed. However, all the available expense details from My Outstanding Expenses load automatically.

For example, the Expense Amount tab displays the amount scanned from the receipt.

The screenshot shows the 'Expense Amount' tab. It includes a text prompt: 'Please enter the total incurred amount and break out any personal or unallowable portion if needed on the expense report.' Below this, there are input fields for 'Payment Method' (set to 'Cash'), 'Expense Incurred' (220.00), 'Reimbursable Pay Amount' (220.00 USD), and 'Ceiling' (20.00). There are also checkboxes for 'Personal' and 'Non-Reimbursable', both set to '0.00'. At the bottom, there are 'View' and 'Remove' buttons.

Receipts and other attachments automatically load on the Expense Attachments tab.

The screenshot shows the 'Expense Attachments' tab. It features a table with columns: 'Attached', 'Missing', 'Reason for Missing Attachment', and 'Attachment'. The 'Attachment' column shows '2 files'. There are 'Attach', 'Missing', and 'View' buttons at the bottom. The 'View' button is dimmed. A 'Query' dropdown is at the top left.

In the image above, “2 Files” in the Attachment column is the number of attachment that exist. Because there is more than one, the **View** button is dimmed. Click the hyperlink in **Attachment** to view them.

The screenshot shows a modal window titled 'Expense Attachments' with a table of attachments. The table has columns: 'File Name', 'Original File Name', and 'Completed By'. The first row shows 'outstandingatt_Meal20200707151745.jpg' and 'Meal.jpg'. The second row shows 'outstandingatt_Example PDF20200712174849.pdf' and 'Example PDF.pdf'. There are 'View' and 'Remove' buttons at the bottom. A 'Close' button is at the bottom right.

After you add and save an expense, it is removed from the My Outstanding Expenses application.

System Administrator Configuration Tasks

This section describes related configuration tasks for Time & Expense System Administrators.

Configure a Batch Type for Manual Expenses

To configure My Outstanding Expenses for first use, System Administrators must add a new manual batch type in **Time & Expense » Expense » Batch Expenses » Expense Batch Types**.

Set the following required fields as follows:

- **Batch Type Code:** Enter a value of “Manual” in this field.
- **Description:** Add text that describes the batch type, such as “Manual for My Outstanding Exp.”
- **Source:** Select **Manual Entry**.
- **Payment Method:** Select **Cash**.

Enable Intelligent Character Recognition (ICR) Processing of Receipts

Receipts uploaded to expense records can be optically scanned to extract basic information about the expense.

This functionality is enabled if you select **Allow ICR Expense Processing** under Mobile Privacy Option on the Miscellaneous tab of **Time & Expense » Configuration » General Controls » General Settings**.

This same configuration applies to Expense Capture in Mobile Time & Expense. If for any reason, your company chooses not to enable Mobile Expense but does choose to enable ICR processing in My Outstanding Expenses, the **Allow ICR Expense Processing** must still be selected.

Note: For more information, see [“Mobile Expense-Related Updates.”](#)

Configure the Import Process to Handle Duplicates

As noted in the “Duplicate Expenses” section above, System Administrators can configure the batch expense process to either allow or remove duplicate expenses during import.

For more information on this new configuration option, see the [“Check for Duplicates Expenses during Import.”](#)

Enhanced File Attachment

Expense Authorization and Expense Report now include the ability to attach multiple files at the overall level of the authorization or report or at the expense line level.

At either level, the Attachments tab includes a new **Attachment** column that displays the total number of files attached as hyperlinked value.

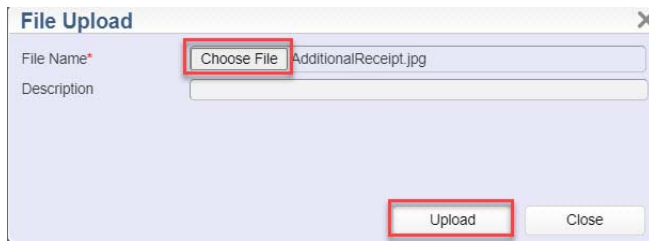
In this example from Expense Report, two attachments exist.

Attachment Type	Description	Required	Attached	Missing	Attachment	Original File Name
Expense Receipt(s)					2 files	[fuel.jpg, Example PDF.pdf]

In **Original File Name**, the name of each file is listed and separated by a comma.

Additional files can be added by clicking **Attach**. For example,

Time & Expense



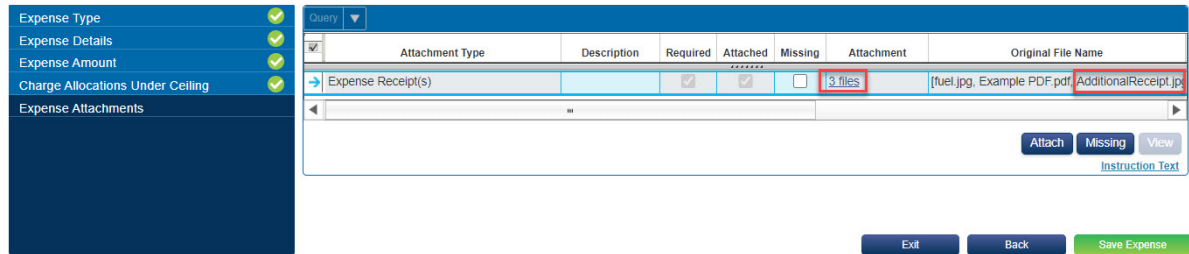
File Upload

File Name* Choose File AdditionalReceipt.jpg

Description

Upload Close

After you click **Upload**, the screen refreshes and the number of attachments is updated. In this example, the **Attachment** column now displays “3 files” and the new file name was added to **Original File Name**.



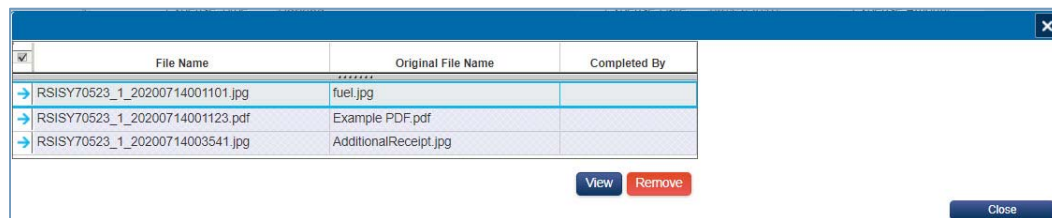
Expense Type ☒ Expense Details ☒ Expense Amount ☒ Charge Allocations Under Ceiling ☒ Expense Attachments ☒

Attachment Type	Description	Required	Attached	Missing	Attachment	Original File Name
Expense Receipt(s)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3 files	[fuel.jpg, Example PDF.pdf, AdditionalReceipt.jpg]

Attach Missing View Instruction Text

Exit Back Save Expense

Because there is more than one attachment, the **View** button is dimmed. To view or remove the attachments, click the hyperlinked value in **Attachment**. (3 files in the image above) to view or replace the attachments. For example:



File Name	Original File Name	Completed By
RSISY70523_1_20200714001101.jpg	fuel.jpg	
RSISY70523_1_20200714001123.pdf	Example PDF.pdf	
RSISY70523_1_20200714003541.jpg	AdditionalReceipt.jpg	

View Remove Close

After a report or authorization is submitted, you have the same option to attach additional files when you click the hyperlink in the **Status** field:

Expense Report ID	Revision	Status	Correction	Total To Me	Batch ID	Payment Received	Charge	Class	TEProject MOs	Total Unallowable	Personal	Non-Reimbursable	Total
RSISY70523	0	Submitted	0	20.00		0.00	DZ1000	Employee - Commercial		0.00	0.00	0.00	

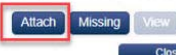
After you click **Submit**, the Workflow dialog box displays:

Expense Report ID	Revision	Status	Correction	Total To Me	Batch ID	Payment Received	Charge	Class	TEProject MOs	Total Unallowable	Personal	Non-Reimbursable	Total
RSISY70523	0	Submitted	0	20.00		0.00	DZ1000	Employee - Commercial		0.00	0.00	0.00	

Primary Role	Task Item	Status	Attachment	Assigned	Expense/Charge	Amount	Currency	Sequence
Employee	Create - Expense Report (Required)	Created		SUPERUSER, CP (CPSUPERUSER) - Mon				0
Employee	Submit - Expense Report (Required)	Submitted		SUPERUSER, CP (CPSUPERUSER) - Tue				1
Primary Supervisor	Approve - Expense Report (Required)	Pending						2
Employee	Attach - Expense Receipt(s) (Required)	Attached	3 files	SUPERUSER, CP (CPSUPERUSER) - Tue	Other/Parking	20.00000	USD	2
Backup Supervisor	Approve - Expense Report (Required)							3

Click the hyperlink in **Attachment** to view or replace the attachments.

Click **Attach** to add an attachment.



Attach Missing View Close

In the above example, if one attachment is added, the hyperlinked value in **Attachment** is updated to reflect the new total number of attachments:

Primary Role	Task Item	Status	Attachment	Assigned	Expense/Charge	Amount	Currency	Sequence
Employee	Create - Expense Report (Required)	Created		SUPERUSER, CP (CPSUPERUSER) - Mon				0
Employee	Submit - Expense Report (Required)	Submitted		SUPERUSER, CP (CPSUPERUSER) - Tue				1
Primary Supervisor	Approve - Expense Report (Required)	Pending						2
Employee	Attach - Expense Receipt(s) (Required)	Attached	4 files	SUPERUSER, CP (CPSUPERUSER) - Tue	Other/Parking	20.00000	USD	2
Backup Supervisor	Approve - Expense Report (Required)							3

Note also that the new My Outstanding Expenses application enables users to create expenses and attach multiple receipts or files to the expense. These manually added expenses can be selected when the employee adds an expense, and all the associated attachments are automatically attached. See [“New My Outstanding Expenses Application”](#) for more information.

Expense Entry by Proxy Enhancement

The process for creating expense reports and expense authorizations on behalf of others (by proxy) can now be accomplished in the same manner as personal expense entry using the following applications:

- **Expense » Expense Reports » Expense Report**
- **Expense » Expense Authorizations » Expense Authorization**

Note: A “proxy” is any user whose functional role includes the right to create expense reports or expense authorizations for another employee. For example, the Supervisor role typically includes “create” rights, but this same right could exist for any role as defined by your company.

When entering expense forms on behalf of others, proxies previously had to use the Manage/Approve applications (Manage/Approve Expense Reports, for example), which are the same applications used to manage other supervisory and workflow tasks, such as approving expense reports.

Now, through the addition of an **Employee** lookup field to the Details tab (Wizard mode only), both types of expense form entry, personal or proxy, are completed from the same application. For example:

Note: This field displays conditionally, based on whether or not the logged in user has been designated as a “proxy,” that is, he or she has the right to create expense forms on behalf of other employees.

The Employee lookup displays all employees for whom the proxy has designated rights. As a proxy user, for example, you choose the employee on whose behalf you are acting, and then click **Select**.

Employee ID	Employee Name
BA100	Allen, BA100 B.
BA200	Allen, BA200 A.
BA300	Allen, BA300 A.
BA500	Allen, BA500 B.
BA700	Allen, Tom R.
9448	Carter, Mike J.
9443	Compher, Bob S.
9500	Johnson, Robertson T.
9445	Karimi, Mohammad C.
9440	Mack, Greg V.
9442	Myers, Mike C.
9441	Scally, Janice P.
9438	Short, Robin T.
9539	Will, Hunter

After the Wizard refreshes, all related information for that individual, such outstanding credit card expenses, or other access rights, such as charge types and expense report types, is available to you. You can otherwise complete the form as you normally would if you were entering your personal expense report or expense authorization.

Updates to Table View

In Table view (Wizard mode only), proxy users see their own expense reports or expense authorizations, as well as those they have created for other employees. These instances are differentiated by the addition of **Created By** and **Role** fields. For example, from Expense Authorization:

Last Name	First Name	Created By	Role
Scally	Janice	Proxy	Primary Administrator
Will	Thomas	Self	Employee
Will	Thomas	Self	Employee

In the first row of the example image above, “Proxy” in **Created By** indicates that the authorization was created by the proxy on behalf of the employee. In the second row, “Self” indicates that the authorization was entered for one’s self.

When the employee (“Scally, Janice” in the above example image) views expense authorizations in Table view, **Created By** also displays “Proxy” for this same authorization, indicating it was created by proxy on her behalf. However, because the employee in this example is not a proxy user, the Role column does not display. For example,

Last Name	First Name	Created By
Scally	Janice	Proxy
Scally	Janice	Self

Other new fields that display in Table view include:

- **Status Code:** This field was added to ensure that records sort according to status, regardless of whether they were created by proxy or self. For example, all expense reports or authorizations with a Draft status are listed first. To ensure proper sorting, each status value is preceded by a numeric sort value (for example, 0Draft, 1Rejected, 2Submitted, and so forth).
- **Advance Paid:** This field, which displays in Expense Authorization, indicates whether the advance, where applicable, has been paid. The value is either Yes or No.
- **Expense Report Paid:** This field displays in Expense Report and indicates whether the expense report has been paid. The value is either Yes or No.

Updated Query Criteria

The Query function was updated to include the new fields as part of the standard search, enabling proxy users to filter the table results by employee, Created By (either Proxy or Self), or additionally:

- Advance Paid (Yes or No) in Expense Authorization.
- Expense Report Paid (Yes or No) in Expense Report.

For example, in Expense Authorization:

The dialog box titled "Expense Authorization" contains a "Search Criteria" section with the following fields:

- Authorization ID: begins with []
- Employee: begins with []
- Last Name: begins with []
- First Name: begins with []
- Created By: is [Proxy]
- Advance Paid: is []

Buttons at the bottom include "Count", "Save Query", "Reset", "Find", and "Close".

When "Proxy" is selected in **Created By**, the query results display only the authorizations that the proxy has created on behalf of others. For example:

Authorization ID	Description *	Blanket	Employee *	Employee Name *	Date *	Revision	Status	From *	To *	Last Name	First Name	Created By	Role	Status
7A00000023			9443	Compher, Bob S.	05/01/2020	3	Submitted	05/01/2020	05/06/2020	Compher	Bob	Proxy	Primary Administrator	2Submitted
7A00000022	test older ER changing class		9441	Scully, Janice P.	04/01/2020	1	Approved	04/01/2020	04/03/2020	Scully	Janice	Proxy	Primary Administrator	4Approved

Conversely, if "Self" is selected, the results include only personal expense authorizations. For example:

Authorization ID	Description *	Blanket	Employee *	Employee Name *	Date *	Revision	Status	From *	To *	Last Name	First Name	Created By	Role	Status
7A00000013	International - Commercial		9439	Will, Thomas R.	04/01/2020	0	Draft	04/01/2020	04/04/2020	Will	Thomas	Self	Employee	0Draft
7A00000012	International - Commercial		9439	Will, Thomas R.	04/01/2020	0	Draft	04/01/2020	04/04/2020	Will	Thomas	Self	Employee	0Draft
EA00000099	International - Commercial		9439	Will, Thomas R.	09/30/2019	0	Draft	09/30/2019	09/30/2019	Will	Thomas	Self	Employee	0Draft
EA00000069	International - Commercial		9439	Will, Thomas R.	09/04/2018	1	Draft	09/02/2018	09/04/2018	Will	Thomas	Self	Employee	0Draft
EA00000064	International - Commercial		9439	Will, Thomas R.	07/19/2018	1	Draft	07/16/2018	07/19/2018	Will	Thomas	Self	Employee	0Draft
EA00000056	International - Commercial		9439	Will, Thomas R.	03/28/2018	0	Draft	03/28/2018	03/28/2018	Will	Thomas	Self	Employee	0Draft

Other Updates to Expense Authorization and Expense Report

Interface Updates

The **Void** button in both Expense Authorization and Expense Report (Wizard mode only) was updated to display a look and feel consistent with the other buttons on the form, such as **Back** and **Exit**. The new color scheme for this button is blue and white. For example:

Authorization ID	TA00000017
Date	04/07/2020
Status	Draft
<div>Void</div>	

Note: All button labels in Expense Wizard are now presented in white font.

Updates to Charge Favorites and Default Charges

A Charge Favorites subtask was added to the Details tab of the Expense Authorization and Expense Report applications. The subtask is available in Expert mode only, but can be used to view or delete existing charge favorites.

Charge Favorites						Delete	Query			
Charge Description	TEAccount	TEProject MOs	UDT07CS Costpoint Company	UDT07CS	UDT09CS					
Overhead Costs	004									
Project DZ1000 (Billable)	01801-010	DZ1000								
2300 100 10 UDT07 link no link test	01801-010	2300 100 10		CLERK						
Booz Allen Project Charge 9800 (Billable)	01801-010	9800 004 10								
Toms override1	01801-010	9800 004 10								
Toms override1		9800 004 10			02					
V3 PRODUCTION REFLECTORS	01200-010	9800 004 10	1	DT	F					
9800 004 10-G125279-1	05030	MO-9800-00002			09					
9800 004 10-G125279-1	05030	MO-9800-00002			D					

In Default Charges, the “New” button was relabeled as “Add Charge” (for example, **Add Charge**).

Per Diem Meal Expense Configuration Enhancement

Expense Types was enhanced to allow you to create separate expense types per meal (for example, breakfast, lunch, or dinner) for per diem with ceiling expenses.

When a meal expense type is configured this way, it eliminates the need to designate the meal type on the expense report. This is especially convenient in Mobile Expense, where, depending on configuration, users can create an expense report from a captured receipt.

On the Input Options tab of **Expense » Expense Controls » Expense Types**, the **Multi-Day** check box and options under **Identify Meals** were previously selected by default and read-only, if **Type** was selected as **Ceiling** on the Basic Information tab.

For meal expense types, these check boxes are now editable when:

- **Per Diem** is selected and **Type** is set to **Ceiling** on the Basic Information tab.
- **Multi-Day** is clear on the Input Options tab.

To configure a new per diem single meal expense type:

1. Click **Expense » Expense Controls » Expense Types**.
2. In **Expense Type Code**, enter a code to identify the expense type.
3. From **Wizard Type**, select **Meals**.
4. On the Basic Information tab, select **Per Diem**.
5. From **Type**, select **Ceiling**.
6. On the Input Options – Required Fields tab, clear the **Multiday** check box.

7. Under **Identify Meals**, clear whichever two check boxes do not apply to the meal expense type you are creating.

For example, if you are creating a “Breakfast” expense type, clear **Lunch** and **Dinner**. Validation allows only one selected check box if **Multiday** is clear.

8. Clear the **Incidentals** check box. This step is optional.
9. Apply other settings if desired.
10. Click **Save**.

When Expense Report users apply this expense type, note the following:


- When entering meal expenses on a single day/single meal ceiling basis, first and last day rules no longer apply (by default, all are set at 100%). The per diem Adjustment Percentage also does not apply (the **Expense Type** field defaults to 100% and cannot be modified).
- Ceilings apply on a single day/single meal basis. If a meal is over ceiling and the day total is under ceiling, the meal will have an over ceiling amount.

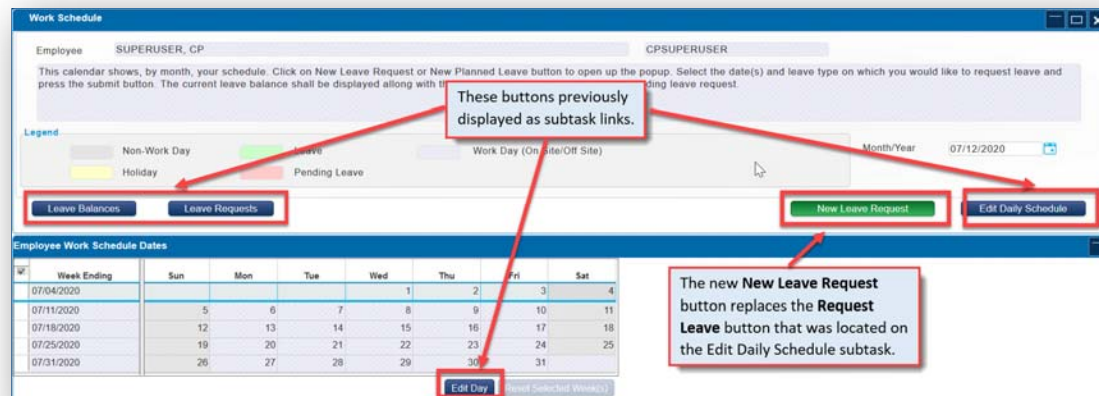
Leave Request Enhancements

The Work Schedule application was modified to streamline tasks related to submitting leave requests, while the Resource Work Schedules screen was also updated so managers can approve or reject leave more easily.

Enhance Employee Leave Request

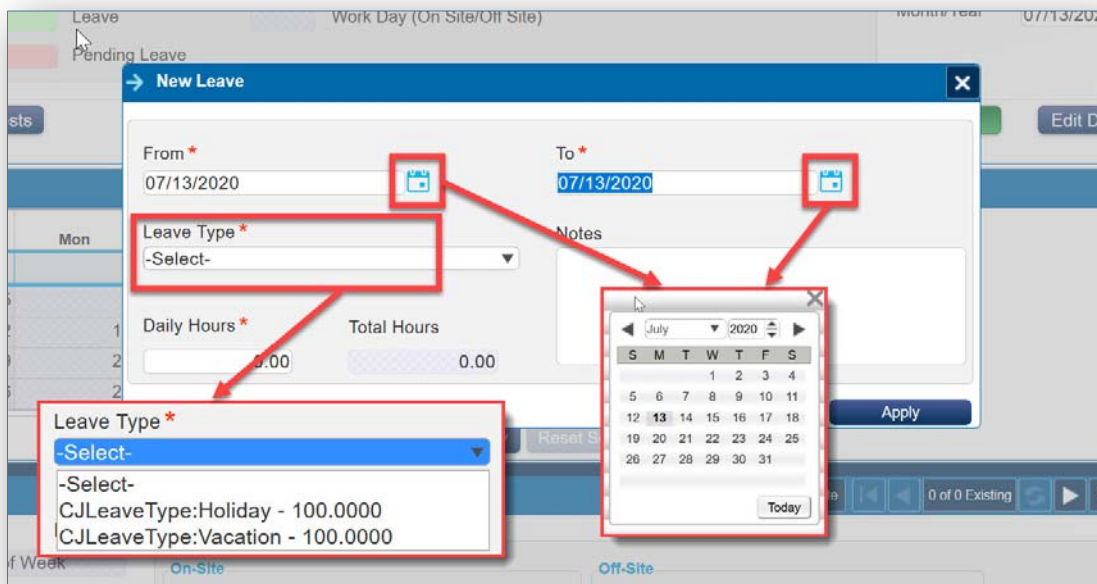
The following leave-related changes were implemented in the **Timesheets » Work Schedule** screen:

- A new button, **New Leave Request** , was added to the Work Schedule screen. This button replaces the **Request Leave** button that was previously located on the Edit Date Properties subtask (now named Edit Day). This change makes it easier for employees to request leave.
- The following Employee Work Schedule subtask links were converted into buttons:
 - Leave Balances
 - Leave Requests
 - Edit Daily Schedule
 - Edit Day



New Leave Subtask


This subtask opens after you click **New Leave Request**. This button replaces the **Request Leave** button that was located on the Edit Daily Schedule subtask.

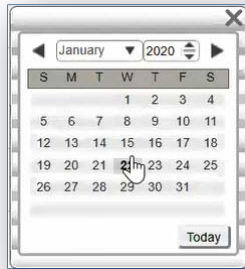


With this subtask, you can use the new calendar lookups to specify either a single day or a range of days for your leave request, and select the type of available leave hours you want to draw upon using the **Leave Type** drop-down list.

The New Leave subtask includes the following fields:

- From:** Click to select the start date for your requested leave.

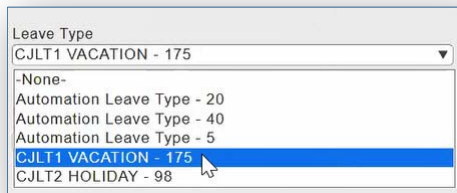
- **To:** Click  to select the end day for your requested leave. If your leave request spans a full work day or less, use the same date in both the **From** and **To** fields.



You can pick hours on multiple days.

Note: With this new process for requesting leave, you specify your requested leave hours by total numbers, rather than designating clock hours.

- **Leave Type:** Use this new drop-down list to select the Leave Type. The drop-down list displays all Leave Types available to the employee based on the employee's Timesheet Class and the quantity of available hours at the time of the request.



Note: This is a required field.

- **Notes:** Enter any explanations related to your leave request. This field is optional.
- **Daily Hours:** Enter the total hours for each day.
- **Total Hours:** This non-editable field aggregates the total hours for the current leave request.
- **Apply:** Click this button to create the new leave request. Your supervisor will be notified of the request via an email notification.

Leave Requests Subtask

The Leave Requests subtask table displays all requests for leave from January of the current year and into the future (this can include the following year, if leave has been requested for days that fall after January 1 of that year). The table list includes both approved leave requests and those pending approval.

Note: The list of pending and approved leave requests can be extensive if it is populated with numerous single day requests.

Cells containing approved hours display in green 8/8.

Cells with leave hours pending approval display in red 8/8.

8	8	8	0
8/8	8/8	8/8	0
8	8	8	0

The following columns were added to the Leave Requests table:

- **Approved Hours:** This column displays the number of hours of an employee's requested leave that have been approved by the employee's manager.
- **Pending Hours:** This column displays the number of leave hours requested by the employee that are awaiting the manager's approval.

Leave Requests - Total for Jan. of selected year and future							Delete	Query			
	Date	Start Time	End Time	Approved Hours	Pending Hours	Notes					
<input checked="" type="checkbox"/>	11/05/2019	12:00 AM	12:00 AM	0.00	0.00	PTO					
	11/13/2019	12:00 AM	12:00 AM	0.00	8.00						
	11/14/2019	12:00 AM	12:00 AM	8.00	0.00						
	01/22/2020	12:00 AM	12:00 AM	0.00	8.00						
	01/23/2020	12:00 AM	12:00 AM	0.00	8.00						
	01/24/2020	12:00 AM	12:00 AM	0.00	8.00						

Enhanced Manager Approve/Reject Leave Requests

The **Time » Timesheets » Resource Work Schedule** screen has been enhanced to enable managers and supervisors to easily review, approve, and reject their employees' leave requests.

Managers receive emails notifying them of leave requests submitted by their employees. Requests for leave on separate days are combined in a single notification email. Click an employee's hyperlinked name in the Resource Work Schedule table to view the Pending Leave Requests table for that employee.

Previously, managers had to open the Work Schedule application in order to click the **Leave Requests** subtask button.

The Leave Requests table displays both leave that has been approved and leave awaiting approval.

Approved leave displays in green 8/8 while leave pending approval displays in red 8/8. The first of the two numbers displayed in the cell represents the number of hours that have either been requested or approved, while the second number represents the total standard hours for the employee's work day.

Leave requests that span multiple days display with each day allotted its own row in the Pending Leave Requests table. You can approve or reject all days of the requested leave, or individual ones.

Although the **Request Leave** button that employees formerly used to submit their leave requests was removed from the Employee Work Schedule's Edit Day (formerly Edit Date Properties) subtask, it remains on the Edit Day subtask for the Resource Work Schedule screen. As before, managers can click the **Request Leave** button to begin the process of requesting leave for their employees.

Application Name Updates

To promote clarity and readability, names for many applications were shortened, simplified, or otherwise changed. Most application names were revised in accordance with the following guidelines:

- Verbs like *Manage*, *Maintain*, and *Print* were removed from many application names. Though not inclusive, the following table provides a number of examples.

Former Application Name	New Application Name
Manage Work Schedule	Work Schedule
Manage Timesheets	Timesheet
Print Interim Timesheet Reports	Interim Timesheets
Configure Time Settings	Time Settings

Former Application Name	New Application Name
Configure General Settings	General Settings

- Application names that included the word *Report* were shortened. For example:

Former Application Name	New Application Name
Outstanding Aging Report	Outstanding Aging
Print Commitment Report	Print Commitments
Print Interim Timesheet Reports	Interim Timesheets
Configure Time Settings	Time Settings
Configure General Settings	General Settings

- A number of applications names were improved, but not necessarily in ways that conform to the guidelines described above. For example:






Former Application Name	New Application Name
Advance Utility	Maintain Advances
Preferences	Profile

Dialog Box Enhancement

To improve the user experience, pop-up windows in Time & Expense no longer display a red border.

Timesheet Button Updates

The **Timesheets » Timesheet** and **Timesheets » Manage/Approve Timesheets** applications were updated to improve the appearance and usability of the following interface buttons:

- In the Timesheet header area, the **New** button was renamed **New Timesheet** .
- In the Timesheet Lines table area, the **New** button was renamed to **Add Line** .
- The **Sign** button displays as green with white text: .
- The **Approve** button displays as green with white font: .
- The **Reject** button displays as red with white font: .

Note: Action buttons in other Time & Expense applications will reflect similar changes, where colors have been standardized according to the type of action. For example, green is used for actions such as submitting, approving, or continuing, while red is used for actions associated with rejecting. Blue is used for a variety of actions, such as executing, adding, or voiding.

Configuration Updates

Information in this section is intended for System Administrators.

Allow Expense Creation from Receipts

An **Allow Expense Creation from Receipts** configuration option was added to the Miscellaneous tab of **Configuration » General Controls » General Settings**.

Costpoint Mobile T&E is integrated with an intelligent character recognition (ICR) technology when you use Capture Receipt. With this feature, Costpoint Mobile T&E automatically scans and analyzes the captured or selected image, maps the captured data to the Expense Report screens, and populates the matched fields.

This setting is selected by default. Leave the setting selected to enable ICR processing, or clear the check box to disable ICR processing.

This same setting applies to the My Outstanding Expenses application in the Web version of Time & Expense, where employees can upload receipts to create expenses. If for any reason, your company chooses not to enable Mobile Expense but does choose to enable ICR processing in My Outstanding Expenses, this setting must still be selected.

The Miscellaneous tab includes other new settings related to Mobile Expense. For more information, see [“Mobile Expense-Related Updates.”](#)

Check for Duplicate Expenses during Import

A new **Perform Duplicate Expense Check When Posting Transaction** option was added to **Expense » Batch Expenses » Batch Expenses**.

This option, which is selected by default, was added because users now have the ability to create manual expenses from either My Outstanding Expenses or Costpoint Mobile Time & Expense, which creates the potential for duplicates when credit card expenses are imported.

Use this new setting to configure how duplicates are handled during import.

If you leave the setting selected, the expense date and amount of each imported expense is compared to existing manual expenses. If a duplicate is found, the import process will:

- Copy attachments from the manual expense to the imported one.
- Populate empty fields on the imported expense with data that may exist on the manual one.

Note: Existing values on an imported expense are read-only and are not overwritten.

- Remove the manual expense.

If you clear the setting, the process does not check for duplicates, so duplicate expenses are allowed.

The duplicates are flagged in yellow highlighting in My Outstanding Expenses, where users can either manually combine them, based on the same rules outlined above, or instead, they can leave both and decide which to claim in Expense Report.

Update to Mobile Responsive Design Interface

The **Enable New Mobile Responsive Design Interface** setting on the Miscellaneous tab of **Configuration » General Controls » General Settings** was updated so that it is now selected by default.

When a user accesses the Web version of the timesheet application through a smartphone browser (as opposed to using the actual Mobile Time application), this setting controls whether the timesheet displays using the Mobile Responsive Design (MRD).

The MRD displays on smartphone browsers using a Portrait (vertical) mode that imitates the standard Mobile App User Interface.

When this check box is selected, the Manage Timesheet application displays in Portrait (vertical) mode in smartphone browsers when users select the **Smartphone Mode** check box on the sign-in screen. MRD imitates Mobile Time display, which is optimized for the smaller screens featured on smartphones.

If you clear the **Enable New Mobile Responsive Design Interface** check box, the timesheet display matches the standard Web version, which is designed for optimum viewing on larger PC monitors and laptop screens.

For additional details on this setting, see the online help for the Miscellaneous tab of **Configuration » General Controls » General Settings**.

Mobile Expense-Related Updates

Several updates related to the new native mobile version of Expense Reports have been applied, including the following:

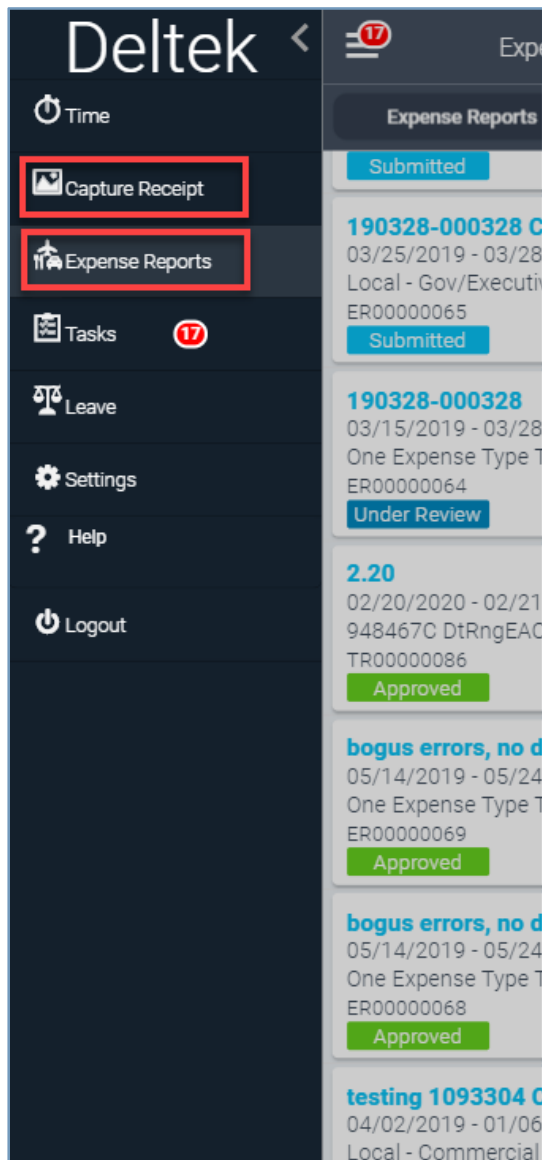
- The Expense module now includes the ability to make multiple receipt attachments per claimed expense line and expense report.
- You now have the ability to view all expense images not yet attached to a report at any point within the entry process.
- In Default Charges, the **New** button was renamed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

Note: 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.

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

Adding Expense Reports Using Your Mobile Device

With the Expense feature, you can add expense reports using your mobile device in the same native application that you use to enter timesheets. Two new menus, Capture Receipt and Expense Reports, are added to the Costpoint Mobile T&E user interface to support this feature.



The Expense Reports and the Capture Receipt menus are available only if you select the **Allow Mobile Access** option, and then select the **Allow Mobile Expense Application** option on the Miscellaneous tab of the General Settings screen in Time & Expense.

Time & Expense

The Capture Receipt screen allows you to either capture an image of the receipt using your device's camera or select an image of the receipt from the archive or camera gallery, and easily attach the captured or selected image of the receipt to an expense report. You can use the expense entry to create a new expense report or to attach it to an existing expense report using the Add Expense screen. When Intelligent Character Recognition (ICR) is enabled, the details from the captured receipt will be extracted and populate the appropriate fields on the Add Expense screen.

EXPENSE DETAILS	
Type *	Car Rental
Expense Date *	07/20/2020
Merchant	Enterprise
Total Amount *	902.39
Currency *	US Dollar (USD)
Comments	Invoice Number: HF9PP Payment Type: cash

The Add Expense screen contains the following fields:

- **Type:** Use this field to select the expense category. Valid categories include Car Rental, Entertainment, Lodging, Meals, Transportation, and Other. This field is populated by ICR (if enabled) and can be edited, if necessary.
- **Expense Date:** Use this field to enter or select the date when the expense was incurred. This field is populated by ICR and can be edited, if necessary.
- **Merchant:** Use this field to enter or select the merchant name used for this expense. This field is populated by ICR and can be edited, if necessary.
- **Total Amount:** Use this field to enter the amount of the expense. This field is populated by ICR and can be edited, if necessary.
- **Currency:** Use this field to select the currency in which the expense was incurred. This field is populated by ICR and can be edited, if necessary.
- **Comments:** Use this field to enter a brief description of the expense report. This field is populated by ICR if there is additional data, like tip available and can be edited, if necessary.
- **Save Receipt:** Tap this field to save the receipt and add it to an expense report at a later time. The expense entry is added to the Outstanding Expenses tab.
- **Save to Expense Report:** Tap this field to add the expense entry to an expense report immediately by creating a new expense report from it or by attaching it to an existing expense report. The expense entry is added to the Deltak Time & Expense database, assigned with an ID number, and added to the Expense Reports tab.

The Expense screen contains two tabs:

- **Expense Reports:** This tab displays a list of your expense reports.
- **Outstanding Expenses:** This tab displays a list of expenses that were imported from a credit card feed or manually entered as an expense and are yet to be claimed. Each expense report displays general information about the expense.

Expense Reports		Outstanding Expenses
Submitted		
190328-000328 COnference	45.00	
03/25/2019 - 03/28/2019 Local - Gov/Executive ER00000065		
Submitted		
190328-000328	45.00	
03/15/2019 - 03/28/2019 One Expense Type Test ER00000064		
Under Review		
2.20	12.00	
02/20/2020 - 02/21/2020 948467C DtRngEAOptRPurpPD... TR00000086		
Approved		
bogus errors, no defaults for	456.00	
05/14/2019 - 05/24/2019 One Expense Type Test ER00000069		
Approved		
bogus errors, no defaults for	486.96	
05/14/2019 - 05/24/2019 One Expense Type Test ER00000068		
Approved		
testing 1093304 CCommitme...	2,366.71	
04/02/2019 - 01/06/2020 Local - Commercial		

The expense reports listed on the Expense Reports tab are sorted by date (from newest to oldest) for each status and are displayed in summary view with the following details:

- **Description:** This is the description that was applied to the expense report when it was created.
- **Date:** This is the expense report date. This can either be a single date or a date range, depending on the expense report type configuration.
- **Total Amount:** This is the total amount of claimed expenses on the expense report.
- **Total to Me:** This is the total amount that will be reimbursed for the expense report.
- **Expense Report Number:** This is the expense report number assigned by Costpoint.
- **Expense Report Status:** This is the status of the expense report. Expense reports statuses are color-coded.

Each expense report entry has the following default sections associated with it:

- **Details:** This section displays the basic information for the expense report.

- **Default Charges:** This section displays the specific charges to which the claimed expense and percentage estimates default.

Expense Report

Will, Thomas R. (9439)
TR00000072

DETAILS 105.00 USD
03/01/2020 - 03/04/2020 **TOTAL TO ME** ▶
1 day, Breakfast meal ceiling 105.00
Draft

LOCATION (2) ▶
Boston
03/01/2020 - 03/02/2020

DEFAULT CHARGES (1) ▶
1 | DZ1000
Booz Allen Project Charge DZ1000 (Billable)

OVERALL ATTACHMENTS (0) ▶

1 day, Breakfast meal ceiling	11.00	
✓ 03/02/2020	USD	▶
Other Providers - Misc. name		
1 day, Dinner meal ceiling	26.00	
✓ 03/02/2020	USD	▶
Other Providers - Misc. name		
1 day, Lunch meal ceiling	12.00	
✓ 03/02/2020	USD	▶
Other Providers - Misc. name		
1 day, Incidental ceiling	5.00	
✓ 03/02/2020	USD	▶

Note: Depending on your company's expense type setup, the Expense Report may display additional sections. For example, **Location** displays if **Track Locations** is enabled for the expense type in Costpoint T&E, **Outstanding Advances** displays if the expense type allows advances, or **Overall Attachments** displays if there are receipts attached to the expense report.

Using Costpoint Mobile T&E, you can manage expense reports by performing several tasks.

- Add expense reports using the New Expense Report screen.
- Edit expense reports with draft or submitted status.
- Attach a receipt as overall attachment of an existing expense report or to its claimed expense line.

- View summarized expense reports along with the ability to drill into expense report details.
- Sign and submit expense reports for approval and processing.
- Void expense reports
- Attach a receipt to an expense report by:
 - Using Capture Receipt
 - Capturing or selecting an image of the receipt and associating it with the Overall Attachments section of an expense report or to a claimed expense line of an expense report

Capture Receipts with Intelligent Character Recognition (ICR)

Through the Capture Receipt feature, Costpoint Mobile T&E enables you to use your mobile device to capture and upload expense information and receipts to the Costpoint Time & Expense database. Capture Receipt is available if you select the **Allow Mobile Access** option, and then select the **Allow Mobile Expense Application** option on the Miscellaneous tab of the General Settings screen in Time & Expense

Capture Receipt allows you to either take an image of the receipt using your device's camera or select an image of the receipt from the archive or camera gallery, and easily attach the captured or selected image of the receipt to an expense report. You can capture and upload a single image of the receipt or combine multiple images of the receipts into a single image using the Stitch functionality.

You can use Capture Receipt in 2 ways:

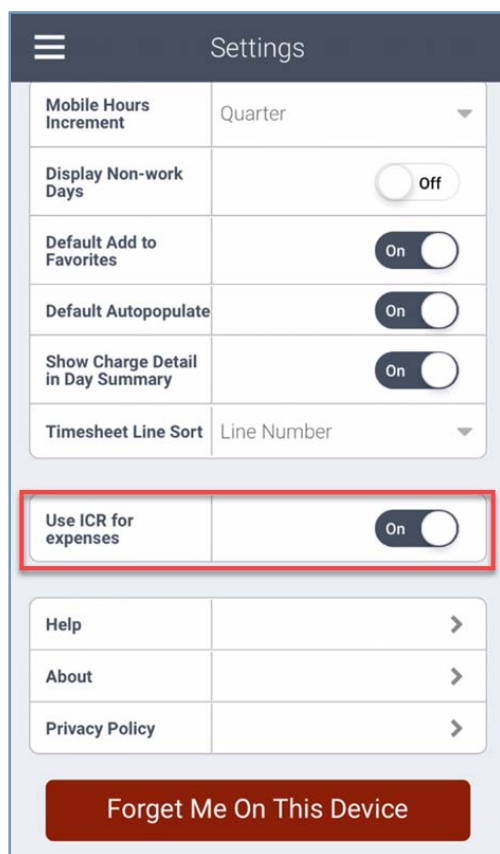
- Capture Receipt with ICR integration enabled
- Capture Receipt with ICR integration disabled

To enable Capture Receipt with intelligent character recognition (ICR) integration, you must:

- Select the **Allow ICR Expense Processing** option on the Miscellaneous tab of the General Settings screen in Time & Expense.

The screenshot shows the 'General Settings' screen for 'Time & Expense' in the 'Miscellaneous' tab. The 'Mobile Privacy Option' section at the bottom right is highlighted with a red box, showing the 'Allow ICR Expense Processing' checkbox checked. Other visible options include 'Allow Mobile Access', 'Allow Mobile Time Application', 'Allow Mobile Expense Application', and 'Enable New Mobile Responsive Design Interface'.

- Set the **Use ICR for expenses** option on the Settings screen in Costpoint Mobile T&E to **On**.



The screenshot shows the 'Settings' screen of the Costpoint Mobile T&E application. The settings are organized into a list of items, each with a label and a control. The 'Use ICR for expenses' setting is highlighted with a red rectangular box. Below the settings list, there are links for 'Help', 'About', and 'Privacy Policy', each with a right-pointing arrow. At the bottom of the screen is a red button labeled 'Forget Me On This Device'.

Settings	
Mobile Hours Increment	Quarter
Display Non-work Days	<input type="checkbox"/> Off
Default Add to Favorites	<input checked="" type="checkbox"/> On
Default Autopopulate	<input checked="" type="checkbox"/> On
Show Charge Detail in Day Summary	<input checked="" type="checkbox"/> On
Timesheet Line Sort	Line Number
Use ICR for expenses	<input checked="" type="checkbox"/> On
Help	>
About	>
Privacy Policy	>
Forget Me On This Device	

With ICR integration enabled, Costpoint Mobile T&E automatically scans and analyzes the captured or selected image, maps the captured data to the outstanding expense created, and populates the matched fields on the Expense screens. Costpoint Mobile T&E sends the image to Deltek's trusted partner for processing and data extraction. Upon the return of the image and extracted data, Costpoint Mobile T&E immediately deletes the image and extracted data from the partner's system, so it is only stored in your Costpoint instance.

Note: The ICR integration feature works only with Capture Receipt. It does not work with the overall attachments and claimed expense attachments even if the feature is enabled.

With ICR integration disabled, you can still use the Capture Receipt feature to capture or select an image of a receipt. However, you need to manually enter or select values in the necessary fields when you create an outstanding expense.

Capture Outstanding Expenses Using Your Mobile Device

Using the Expense feature, you can capture expenses using your mobile device. Outstanding expenses are expenses imported from a credit card feed, created through Capture Receipt, or manually entered as an expense, and are not yet claimed on an expense report.

Outstanding expenses are displayed on the Outstanding Expenses tab of the Expense Reports screen. You can hide outstanding expenses displayed on the Outstanding Expenses tab if you will not ever claim it; for example, a personal expense is imported from a credit card feed. You can modify the details of an existing outstanding expense and even attach a new receipt to it. You can also delete a previously captured expense if it is used as an outstanding expense in a claimed expense line. When you delete a

claimed expense line that is used as an outstanding expense, the claimed outstanding expense becomes an outstanding expense again and is displayed back to the Outstanding Expenses tab.

There are two ways to add an outstanding expense to an existing expense report.

Using Capture Receipt

Use Capture Receipt to capture or select an image of the receipt. After completing the Add Expense screen details, immediately add the receipt to an expense report by tapping **Choose Existing Report** on Expense Report Options screen. Tap an existing expense report to which you want to attach the expense entry. On the Expense Details screen, Costpoint Mobile T&E populates the matched fields from the expense entry, or you can enter or modify the values in the fields. When you save your changes, the expense entry is added to the expense report.

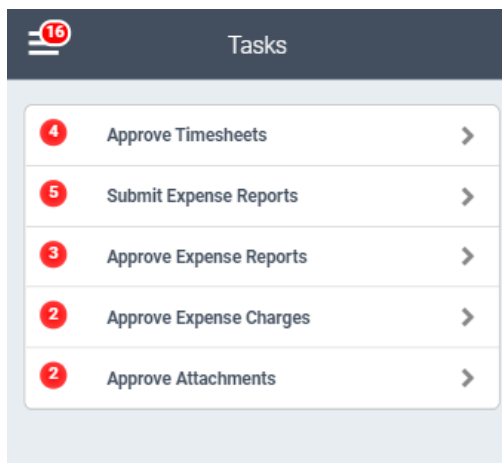
Using the Outstanding Expense Section of the Expense Details Screen

You can add an outstanding expense to an existing expense report using the **Outstanding Expense** field of the Expense Details screen if you select an expense type with outstanding expenses.

Managing Expense Tasks

The Tasks screen of the Costpoint Mobile T&E user interface now displays Expense related tasks, which include:

- Submit Expense Reports
- Approve Expense Reports
- Approve Expense Charges
- Approve Attachments



The following table describes each Expense task category and to which role the category is available.

Task Category	Description	Resource Manager	Resource
Submit Expense Reports	This task category is displayed and available for resources and resource managers. Tap Submit Expense Reports to display the expense reports that you created or someone has created for you, and you need to submit for approval.	✓	✓
Approve Expense Reports	Tap Approve Expense Reports to display the Approve Reports screen, where you can approve or reject expense reports submitted for approval.	✓	
Approve Expense Charges	This task category is displayed and available only for resource managers. Tap Approve Expense Charges to display the Approve Charges screen, where you can approve or reject expense report charges submitted for approval.	✓	
Approve Expense Attachments	This task category is displayed and available only for resource managers. Tap Approve Expense Attachments to display the Approve Attachments screen, where you can approve or reject expense report attachments submitted for approval.	✓	

Configure Usage Tracking through Google Analytics

Google Analytics is a tool that Deltek uses to anonymously gather mobile application usage, such as user interface clicks and selections and application crashes. Users opt in for usage tracking when they install and launch the Costpoint Mobile Time & Expense application.

While usage tracking is completely anonymous, Deltek understands that some companies do not want to allow their users to opt in to this usage tracking tool. With this, Deltek adds an option that you can configure to not allow users to opt in.

To manage your company's usage tracking through Google Analytics, the **Allow users to send information to Google Analytics** option is added to the Miscellaneous tab of the General Settings screen in Time & Expense. If cleared, this option takes precedence over the **Usage Tracking** option in the Costpoint Mobile T&E application.

If the **Allow users to send information to Google Analytics** option 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 on the Settings screen is displayed and available.

If the **Allow users to send information to Google Analytics** option is cleared, Costpoint Mobile T&E follows the following behavior:

- The **Usage Tracking** field on the Settings screen is not displayed.

- Even if you set the Usage Tracking screen toggle to **On** when you first launched the application, Costpoint Mobile T&E will not send information to Google Analytics.

Help System in HTML Format

The Costpoint Mobile Time and Expense User Guide, previously in PDF format, is now delivered in HTML format.

Back Arrow Button Added to the PIN Screen

The back arrow button is added to the PIN screen to allow you to navigate back to the Settings screen without closing out the application in case you decide not to change your PIN.

Support for PHP 7.4.8

The Costpoint Mobile T&E Server has been upgraded to support PHP 7.4.8.

Reports & Analytics

This section describes Costpoint 8.0 enhancements for the Reports & Analytics domain.

Role-Based Dashboard Enhancements

Several upgrades have been made to the dashboards to improve usability. You will find new icons and dialog boxes that will help you better navigate the dashboards, easily set up dashpart settings, and get additional information about the dashpart in an instant.

A new dashpart is created to give you the ability to view and manage your workflow approval tasks. Other improvements made to the dashboards are listed in detail below.

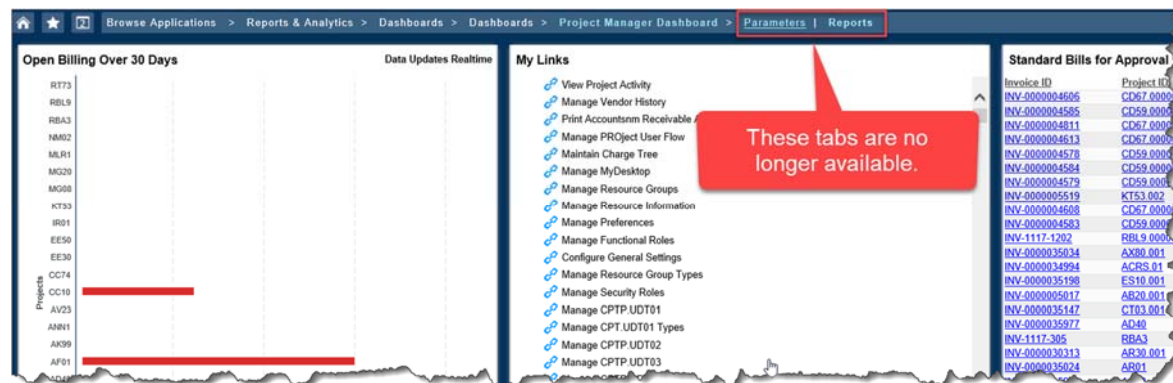
Note: The changes apply to all dashboards unless otherwise specified.

Attention: View the [What's New for Dashboards in Costpoint 8.0](#) video for a demonstration of new dashboard features introduced in this release.

Manage Dashparts and Edit Icon Replacing the Parameters Tab

You no longer need to toggle between the Parameters and Reports tabs as these have been removed from the dashboards. When you access any of the four dashboards, Costpoint displays just the graphical/tabular presentation of the dashparts (Report view in previous functionality).

Previous Look




Current Look

You now use the new Manage Dashparts dialog box to specify what dashparts you want to view and how you want them organized on the dashboard. To open this, click the **Manage Dashparts** link on the upper part of the screen.

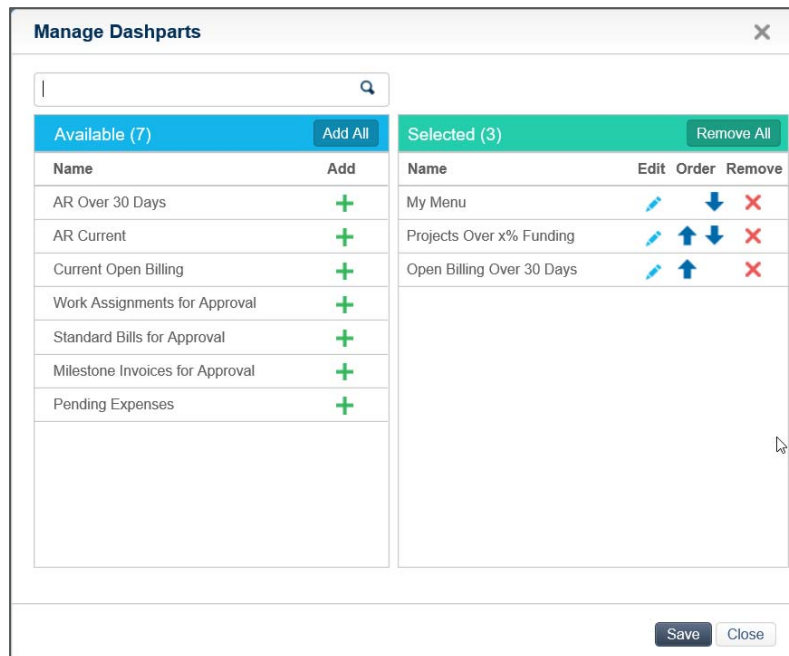
Reports & Analytics




On the Manage Dashparts dialog box, you can specify which dashparts you want to display on the dashboard by using the **Add** and **Remove** buttons. You can also arrange them using the **Order** up and down arrows. A search box is provided on the left side so you can search for available dashparts that you want to add to the dashboard.

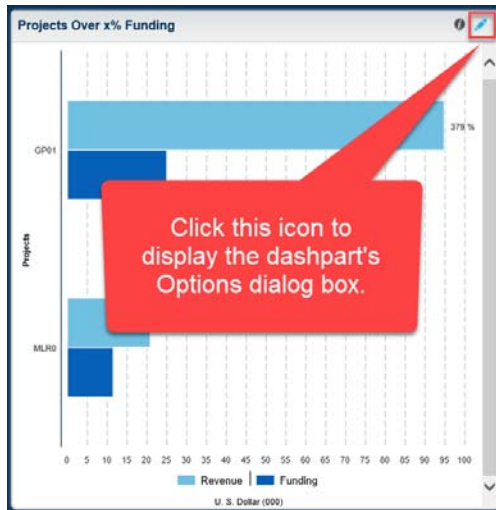
If you want to modify the settings for a specific dashpart, click the **Edit** icon  beside it and make your changes.

When you are done with your updates, be sure to click **Save** for your changes to take effect. Costpoint refreshes the dashboard and closes the Manage Dashparts dialog box after you click **Save**.



New Edit Icon

The **Edit** icon  is also available on the individual dashparts. Note, however, that if there are no dashpart settings, the **Edit** icon will still display on the dashpart and on the Manage Dashparts dialog box, but will be disabled (grayed out). When you click this icon here or on the Manage Dashparts dialog box, the Options dialog box displays and you can modify the settings used for that particular dashpart.



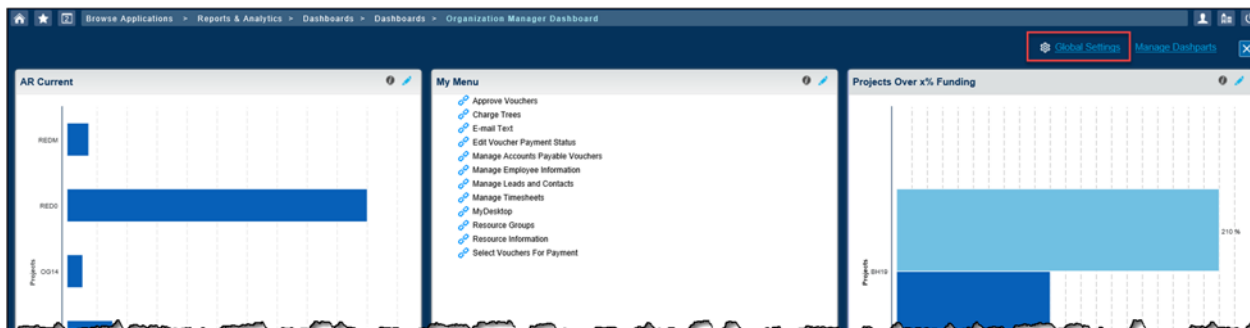
The following example contains the fields/options that you can modify for the Projects Over x% Funding dashpart when you click the **Edit** icon. The current field names may differ from the parameter names used in the previous Costpoint version, but the functionality remains the same: only the settings you specified here will be used on the dashpart.

When you are done with your updates, be sure to click **Save** for your changes to take effect. Costpoint refreshes the dashpart and closes the Options dialog box after you click **Save**.

Attention: For more details on the default settings for each dashpart and how you can modify them, see the dashboard's online help.

Global Settings

A **Global Settings** link is now available on the Organization Manager Dashboard and Finance Manager Dashboard.



When you click this link, the Select Dashboard Options dialog box displays. Here, you can enter a value in the **Limit Data to Organizations that Start With** field and specify the organization for which you want to view data. After you have saved your change on the dialog box, all the dashparts on the dashboard display data for the selected organization and all levels below it.

This functionality was previously included on the Parameters tab.

Home Dashboard Updates

The following enhancements are applicable only to the dashparts available on Home Dashboard.

New My Workflow Approvals Dashpart

The My Workflow Approvals dashpart is now available on the Home Dashboard. This is a table containing a list of the workflow 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 includes 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. You can click a workflow name link to open the specific screen in Costpoint where you need to accomplish the outstanding workflow approval task or view additional details related to the task.

Updated Drill-Through on the My Tasks Dashpart

The drill-through links on the My Tasks dashpart now let you directly launch the screen where a specific task should be completed. Previously, the links were directed only to the Manage MyDesktop screen. Manage MyDesktop is no longer available in Costpoint 8.0.

You can now access the following applications from My Tasks if you have pending tasks that you need to accomplish on these screens:

- Expense Authorization
- Expense Report
- Manage/Approve Expense Authorizations
- Manage/Approve Expense Reports
- Manage/Approve Timesheets
- Resource Work Schedules
- Timesheet

Note, however, that you will be able to open the drill-through application only if you have the appropriate rights to that application.

New Record and Multi-Select Function

The following dashparts have been enabled with the new record and multi-select function:

- My Timesheets
- My Expense Reports
- My Expense Authorizations

When you click the **New Timesheet**, **New Report**, or **New Authorization** link on the respective dashpart, the system opens the Timesheet, Expense Report, or Expense Authorization screen in Time & Expense with a blank record, and you can create a new timesheet, expense report, or expense authorization.

These dashparts also have the new **Launch** and **Launch Selected** links. If you have not selected any check box on these dashparts, **Launch** is displayed. If you selected one or multiple check boxes corresponding to the records you want to view, **Launch Selected** is displayed. When you click **Launch Selected**, the drill-through application opens with data for the records you selected. You can choose all records by selecting the **Select All** check box at the top of the first column.

Reports & Analytics

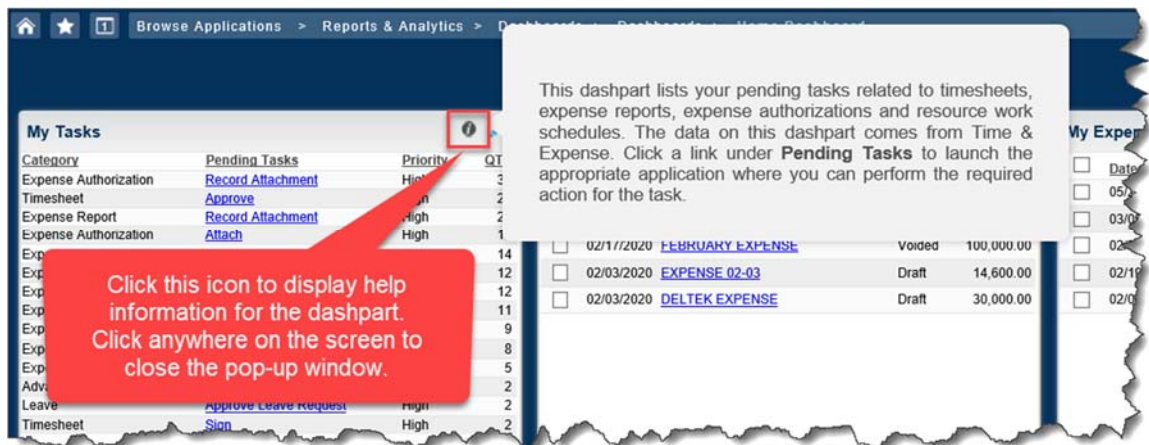
My Timesheets					New Timesheet	Launch	
<input type="checkbox"/>	T/S Period End Date	Description	Status	Hours			
<input type="checkbox"/>	04/15/2020	Automation TS - 0001	Approved	91.00			
<input type="checkbox"/>	03/31/2020	Automation TS - 0001	Processed	103.00			
<input type="checkbox"/>	03/15/2020	Automation TS - 0001	Open	0.00			
<input type="checkbox"/>	02/29/2020	Automation TS - 0001	Open	90.00			
<input type="checkbox"/>	02/15/2020	Automation TS - 0001	Open	95.00			
<input type="checkbox"/>	04/30/2019	Automation TS - 0001	Open	6.00			
<input type="checkbox"/>	04/15/2019	Automation TS - 0001	Signed	94.00			
<input type="checkbox"/>	11/15/2018	Automation TS - 0001	Open	40.00			
<input type="checkbox"/>	10/31/2018	Automation TS - 0001	Open	88.00			
<input type="checkbox"/>	10/15/2018	Automation TS - 0001	Approved	0.00			

My Timesheets					New Timesheet	Launch Selected	
<input type="checkbox"/>	T/S Period End Date	Description	Status	Hours			
<input checked="" type="checkbox"/>	04/15/2020	Automation TS - 0001	Approved	91.00			
<input type="checkbox"/>	03/31/2020	Automation TS - 0001	Processed	103.00			
<input type="checkbox"/>	03/15/2020	Automation TS - 0001	Open	0.00			
<input checked="" type="checkbox"/>	02/29/2020	Automation TS - 0001	Open	90.00			
<input checked="" type="checkbox"/>	02/15/2020	Automation TS - 0001	Open	95.00			
<input checked="" type="checkbox"/>	04/30/2019	Automation TS - 0001	Open	6.00			
<input type="checkbox"/>	04/15/2019	Automation TS - 0001	Signed	94.00			
<input type="checkbox"/>	11/15/2018	Automation TS - 0001	Open	40.00			
<input type="checkbox"/>	10/31/2018	Automation TS - 0001	Open	88.00			
<input type="checkbox"/>	10/15/2018	Automation TS - 0001	Approved	0.00			

Other Updates

The following updates apply to all dashboards:

- A **Help** icon ⓘ is now available on each dashpart. When you click this icon, Costpoint displays 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.



- With the removal of the Parameters tab, the close button is now visible on the dashboard view.
- The **Next Page** ➡ and **Previous Page** ⬅ icons are available on the Global Toolbar when you open each dashboard. Depending on your screen resolution, the selected dashparts might not be visible on the screen. Use these icons to navigate to the next/previous page of the dashboard.

If your screen resolution is 1680x1050 and the scale is 100%, you should see 8 dashparts clearly without scrolling. This is the recommended display setting. If you use any other display settings, you may see more or fewer dashparts on the screen at one time.

This change applies to the Project Manager Dashboard, Organization Manager Dashboard, and Finance Manager Dashboard:

- The My Links dashpart has been renamed to My Menu.

These changes apply to the Finance Manager Dashboard:

- The JE's Over Approval Limit dashpart has been renamed to Journal Entries Over Approval Limit.
- The Voucher Over Limit dashpart has been renamed to Vouchers Over Approval Limit.

- The following dashparts now use the current period from the Manage Current Reporting Period screen:
 - Cash Balances
 - Journal Entries Over Approval Limit
 - Posted Invoices
 - Vouchers Over Approval Limit

The Manage Current Reporting Period screen is used to configure the reporting period that the Costpoint Business Intelligence application will use. This screen is available in Costpoint through **Reports & Analytics » BI Configuration » Configuration » Manage Current Reporting Period**.

Costpoint Business Intelligence 8.0

Costpoint Enterprise Reporting (CER) has been renamed to Costpoint Business Intelligence or Costpoint BI. While it now has a different name, it still utilizes project data with speed, agility, and accuracy.

Costpoint BI 8.0 leverages Cognos Analytics 11.1.5 features.

Procurement Content

A new data model is available for Procurement. This new model supports Organizational and Part security for standard and ad hoc reports as well as the new Procurement dashboard. These security enhancements suppress org specific data from users based on their Org security settings and limit visibility into reports or data that contain unauthorized parts based on part security setup. The following reports are 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 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 is available for Manufacturing. This new model supports Organizational and Part security for standard and ad hoc reports as well as the new Manufacturing dashboard. These security enhancements suppress org specific data from users based on their Org security settings and limit visibility into reports or data that contain unauthorized parts based on part security setup. The following reports are 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.
- **On Time and Late:** Get insight into planner performance by comparing MOs that are on time vs. those that are late for both release and in-shop for each MO. The drill-through reports show you MO details grouped by planner to reveal the on time and late percentage values.
- **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 is available for Materials, which supports Organizational and Part security for standard and ad hoc reports for Sales Orders, Product Definition, and Inventory. These security enhancements suppress org specific data from users based on their Org security settings and limit 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 is now available. There are two new reports in Time, namely:

- Charge Activity
- Resource Activity

A new user group for Costpoint Business Intelligence was created for this new Time model, which is the CER Time Secure (CER__TE_SECURE).

Artificial Intelligence (AI)-Assisted Business Intelligence

Costpoint BI takes 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 also automatically provides 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 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 provides you with more options in analyzing data for your unique business needs.

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

- Understand future resource needs including generic staff and vendors.
- Analyze historical utilization vs. budgets and EACs.
- 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

Sample Dashboards with Data Sets

Some of the existing dashboards in Costpoint BI have been modified and now leverage data sets. Data sets help achieve better performance in generating results in dashboards. These dashboards are located in **Team content » Samples – Costpoint BI » Dashboards with Data Sets**. These dashboards are in the areas or modules of:

- Manufacturing
- Planning
- Projects
- Executive

Data sets are now available for the following areas or modules:

- Accounts Receivable
- AR Project Dimension
- Employee Change Notices (ECN)
- General Ledger (GL)
- Labor History
- Manufacturing Orders (MO)
- Planning
- Project Status Report (PSR)

These data sets are in **Team content » Samples – Costpoint BI » Dashboards with Data Sets » Data Sets**.

Accounts Payable Content

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

Accounts Payable Aging Report

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

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

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

New Contracts Reports

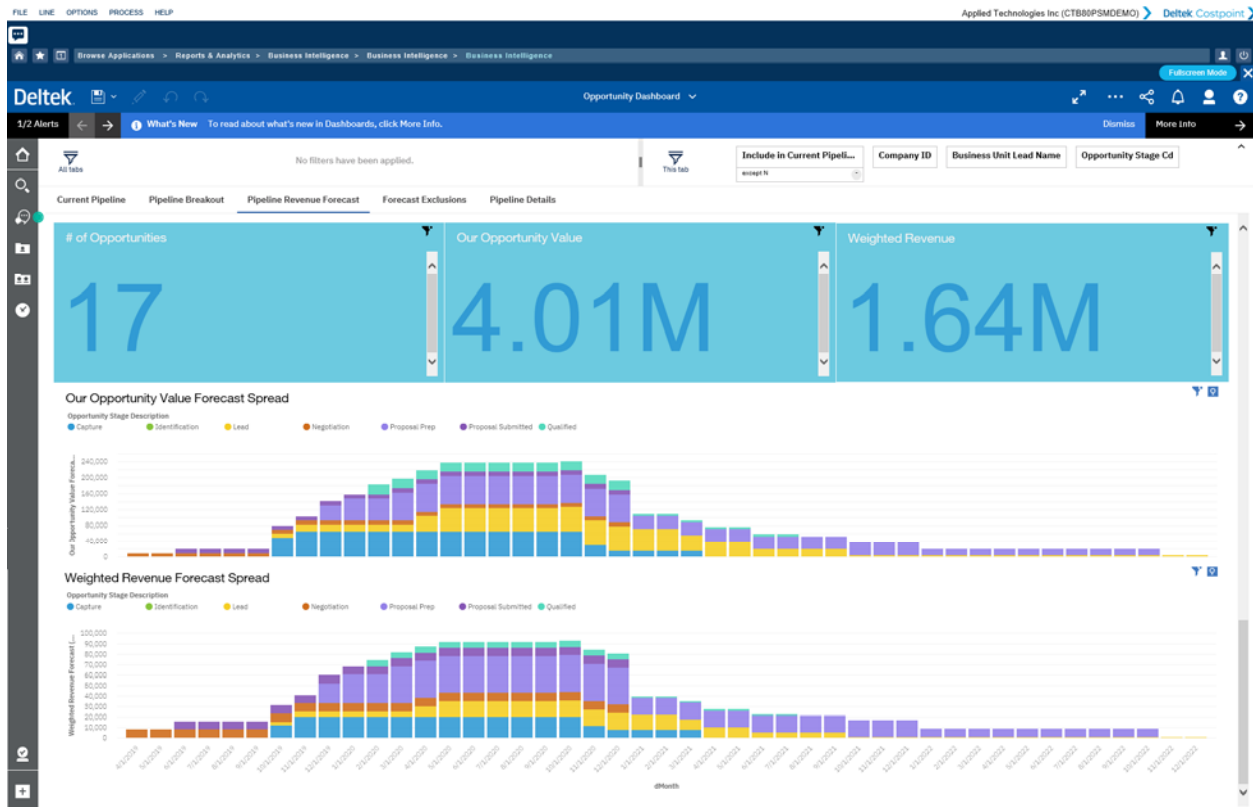
The following new reports have been added to the Contracts module:

- **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.

Opportunity Dashboard

The new Pipeline Revenue Forecast tab is now available on the Opportunity Dashboard that includes:

- **Opportunity Value Forecast Spread:** This displays the estimated start date and estimated dates of the opportunities and evenly spreads out the opportunity value over the months.
- **Weighted Revenue Forecast Spread:** This displays the estimated start date and estimated completion dates of the opportunities and evenly spreads the weighted revenue over the months.



Project Planning Models

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

New Security Groups

New security groups that allow authorized users to access secured packages and to provide more granular security with the new Materials, Materials Manufacturing, and Procurement areas in Costpoint BI are now available. These new security groups are:

- **CER Materials Manufacturing All Secure (CER_MM_ALL_SECURE):** This is a Deltek group used to set permissions on all secured Materials Manufacturing content.
- **CER Procure Secure (CER_PROCURE_SECURE):** This is a Deltek group used to set permissions on secured Procurement content.
- **CER Materials Secure (CER_MATERIAL_SECURE):** This is a Deltek group used to set permissions on secured Materials content.
- **CER Manufacturing Secure (CER_MFG_SECURE):** This is a Deltek group used to set permissions on secured Manufacturing content.
- **CER Time Secure (CER_TIME_SECURE):** This is a Deltek group used to set permissions on secured Time content.
- **CER Expense Secure (CER_EXPENSE_SECURE):** This is a Deltek group used to set permissions on secured Expense content. It is added in preparation for an enhancement in a future Costpoint BI release.

Costpoint Authentication Provider 8.0

The Costpoint Authentication Provider 8.0 or CAP was modified to support the new security groups in Costpoint BI 8.0.

Manage BI Settings

The Manage CER Settings (BIMCERSETTINGS) application has been renamed as Manage BI Settings. The menu path is **Reports & Analytics » BI Configuration » Configuration**.

Other major changes were also applied to this screen:

- The **Budget Source** column has been removed.
- The **Enable Model Security** column has been renamed as **Enable CP & Planning Model Security**. You can select either **Yes** or **No** to enable or disable model security for the Costpoint and Costpoint Planning models. Model security is enabled by default.
- The **Use CP Organization Security By Module** option has been added, which you can use to either enable or disable organization security in the following new secure models:
 - Accounts Receivable
 - Accounts Payable
 - General Ledger
 - Manufacturing
 - Materials
 - Procurement
 - Projects

The **Enable T&E Model Security** is a new column that lets you enable or disable model security for the Time model. Expense will soon be available in a future release.

Framework Model Changes

Five new framework models were added in this release:

- **Accounts Payable**: This model is used by the new Accounts Payable Aging Report.
- **Procurement**: This model is used by the reports in the new Procurement folder in Team content.
- **Manufacturing**: This model is used by the reports and dashboard in the Manufacturing folder in Team content.
- **Materials (Seller)**: This model is used by the reports in the Materials folder in Team content.
- **Time**: This model is used by the reports in the Time folder in Team content.

The following framework models have been updated to account for module level security:

- Projects

Reports & Analytics

- Accounts Receivable
- General Ledger

Admin

This section describes Costpoint 8.0 enhancements for the Admin domain.

Costpoint Login Banner

To meet the requirements of some organizations, administrators can configure a message that displays during login. Users will be prompted to acknowledge the message 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 provides 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 displays 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. To do so, 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 security access needed 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 now has the ability to run a preprocessor to update the **Active Directory or Certificate ID** field on the Manage Users (SYMUSR) screen. They can create an import file that includes the users' Costpoint ID and Active Directory ID. This enhancement reduces the time needed to update the Active Directory ID for a large number of employees. The Deltek Costpoint 8.0 Import Active Directory ID Preprocessor documentation is available on DSM.

Support for Dynamic Columns

The Costpoint Web service is updated to support the population of dynamic columns in New Business budget applications in the Planning module.

Display New UI Interface Only

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

Content Management Integration (CMI) Updates

Enhancements include Costpoint CMI compatibility with SharePoint 2019.

New Default Email for Costpoint Cloud Email Notifications

To comply with company security policies, all email notifications initiated from Costpoint now have a default sender email address of Noreply@Deltek.com. This email address is not customizable.

Business Intelligence and Reporting Tools (BIRT) Upgrade

Costpoint is updated to include the latest version of BIRT.

Digital Signature Admin Updates

The Costpoint Admin domain is updated to support the new Supplier Portal-Digital Signature for Invoices feature. Updates include a new Digital Documents application group (**Admin » System Administration » Digital Documents**) and new system settings.

Manage Digital Document Types (SYMDDOCTYP)

The Manage Digital Document Types application in the Digital Documents application group enables you to:

- Define document types and their data fields that will support approvals via digital signatures.
- Select **Active** to enable or disable the use of digital signatures for a document types in all applications where the document type is available.
- Select the **Enforce Signature Attestation via User Certificate** check box to only allow users who were issued a digital certificate from a trusted company the ability to digitally sign documents
- Configure a message that displays when a user digitally signs a document type.
- Select a check box to acknowledge and agree to the use of digital signatures for legal purposes.

Manage Digital Document Links (SYMDDOCLNK)

After defining a document type, use the Manage Digital Document Links application in the Digital Documents application group to:

- Specify which document types will link to a specific Costpoint application and result set.
- Map the Costpoint application and result set to a specific digital document object to define a linking rule in the new Digital Document Object Links subtask.
- Define the fields that will update when a record is digitally signed or unsigned in an application in the new Digital Document Field Updates subtask.

Configure System Settings (SYMSETNG)

The following updates are applied to Configure System Settings:

- The Security Settings tab has been updated with a FIDO Settings section that enables administrators to restrict the use of certain FIDO devices for login and digital signing. Set device requirements with the new **Enforce User Verification** and **Enforce Device Attestation** check boxes.
- The Security Settings tab also includes the new Trusted Root Certificates subtask that enables administrators to add or upload company root certificates that are used to establish a trust or digital link between the company and the user who will digitally sign documents on behalf of the company.

FIDO Biometric Enforcement

Administrators can now require the use of FIDO devices with a biometric component (fingerprints, face recognition, etc.) for authentication and digital signing purposes. Costpoint applications that are updated to further support this feature include Manage Users and Configure User Preferences.

Manage Users (SYMUSR)

On the Manage Users screen, more user-level control is available for administrators in support of the feature:

- Administrators can select the new **Can Add New FIDO Device** check box for a user, so that they can self-register or activate their own FIDO device(s).
- A new FIDO/Biometric Devices subtask lets administrators view, delete, and change the description or purpose of FIDO devices currently registered for a user (but not add them). A user has the capability to add new a FIDO device in this subtask in User Preferences.

In addition, the following actions in the Action menu on the Global Toolbar has changed:

- **Generate new FIDO Device self-registration link** is renamed to **Generate FIDO Device self-registration link**.
- **Remove FIDO Devices and self-registration links** is renamed to **Remove FIDO Devices self-registration links**.

Configure User Preferences (UPMUSRPR)

Previously, the FIDO/Biometric Devices subtask only displayed if a user utilized FIDO authentication. For 8.0, this subtask is always visible in Configure User Preferences. Also, users can now use this subtask to send a certificate signing request for a digital certificate to their company and upload the certificate to Costpoint.

To enable users to add their own FIDO devices, the new **Can Add New FIDO Device** check box must be selected for the user in Manage Users.

FIDO Logo on Costpoint Login Screen

A FIDO logo displays on the Costpoint Login screen to indicate that FIDO is a supported authentication option for Costpoint desktop and mobile applications.

Platform Changes

This section describes platform changes for Costpoint 8.0.

Web Browser Support

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

Message Board Retired

The Message Board feature that allowed you to link Microsoft Exchange email threads with specific Costpoint documents is no longer supported in Costpoint 8.0. As an alternative, you can use the Costpoint Workflow Engine capability to send email notifications for your approval workflows. You can find more information on the Workflow Engine in the [online help](#).

Known Issues

This section includes summaries of the issues that exist in this Costpoint release.

Reference Links in the Costpoint Documentation

If you click a hyperlink to a Deltek documentation or learning aid, you may be directed to a Deltek Costpoint 7.1.x documentation instead of version 8.0. Deltek is actively working to resolve this issue.

Costpoint Business Intelligence

Tabs on BI Reports

You may encounter an error when you run reports that have tabs. This may happen when you generate the report after the initial run. As a workaround, close the report and run in MS Excel.

This Cognos Analytics issue has been reported to IBM.

Tenant Setting Properties in BI

You could not set the Tenant Settings to None on the report or dashboard properties page. This is a Cognos Analytics issue and a case has been submitted to IBM. As a workaround, you can click the **Clear** button to achieve the same result.

Unauthenticated User in Costpoint

When you log on to Costpoint and open the Business Intelligence application, you may get an error message that says that your user account is not authenticated in Costpoint. This happens when the Costpoint Authentication Provider (CAP) is still processing your authentication.

To display the Business Intelligence application:

1. Click **Close** (x) on the upper right-hand side of the Business Intelligence application.
2. Reopen the Business Intelligence application. Click **Reports & Analytics » Business Intelligence » Business Intelligence » Business Intelligence**.

Costpoint Timeout Limit

When you log on to Costpoint BI through Costpoint, you may experience a Costpoint session timeout even if you are actively using Costpoint BI. When you are about to reach the timeout limit, a message displays that gives you the option to continue your session. If the system does not receive any response, you may potentially lose work and will have to log in back to the system.

As a workaround, increase the session timeout limit in Costpoint.

Deltek is actively working to resolve this issue.

Custom Group Permissions

If you have custom user group permissions, they might not have been applied to objects via the Cognos user group that is mapped to the Costpoint Authentication Provider (CAP) group.

As a workaround, use the CAP group directly when applying user group permissions.

Drill-Throughs on a Dashboard Object with Two Measures

An error occurs when you link a drill-through report to an object on a dashboard that has two measures. This issue has been reported to IBM. For more details, please see the [IBM support issue](#).

Item/Part Filters Do Not Display All Parts Set to Companies

If the **Separate Items by Company** check box on the Configure Product Definition Settings (PDMITMRU) screen is clear, not all parts may display regardless of Company in some reports.

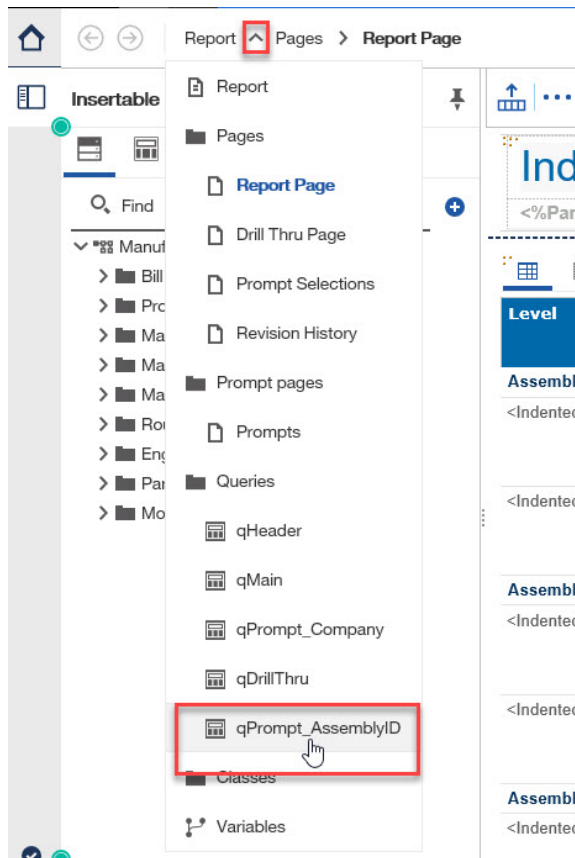
As a workaround, you need to disable the company filter in their corresponding query. The affected reports for this issue are listed in the following table along with the query.

Area	Report	Query
Manufacturing	Indented Bill of Materials (BOM) Report	qPrompt_AssemblyID
Manufacturing	MRP Message Report	qAssembly
Manufacturing	Summarized Bill of Material (BOM) Report	qPrompt_AssemblyID2
Materials	Stock Status Report	qPrimaryGrpFilter; qSecondaryGrpFilter
Materials	Parts List Report	qPartRev
Materials	Goods List Report	qPartRev
Materials	Services List Report	qPartRev
Materials	Item Vendors - Drill Thru Report	qPartRev
Manufacturing	MO Component Shortage	qPartRev

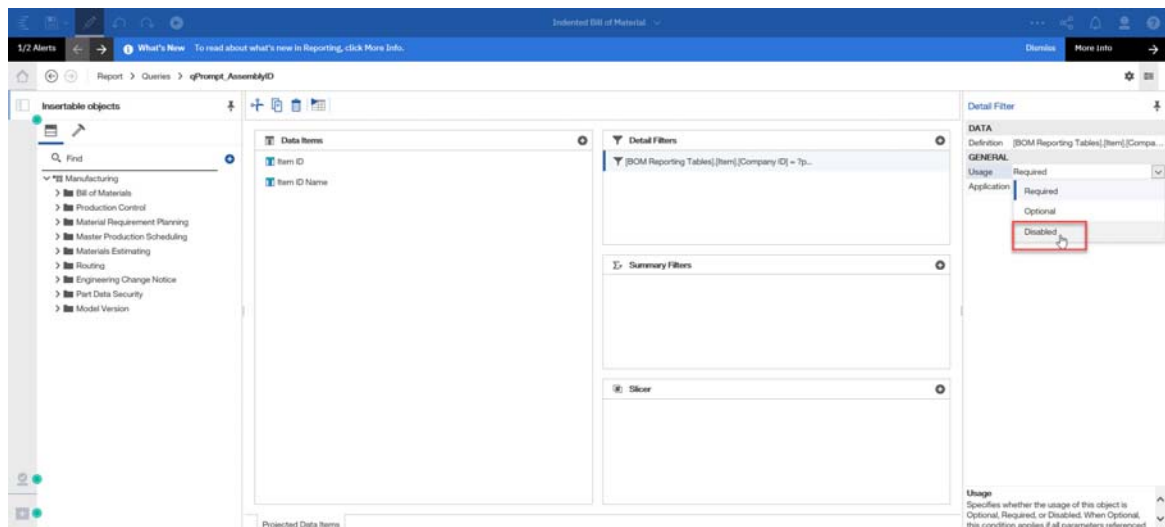
To disable a company filter:

1. In Costpoint BI, go to the report, click the adjacent ellipsis (...), and select **Edit Report** (for example, **Indented Bill of Materials**).
2. Go to the breadcrumb trail at the top of the report and click **Report** to display the **Queries**. Select the query to modify (for example, **qPrompt_AssembleID**).

Known Issues

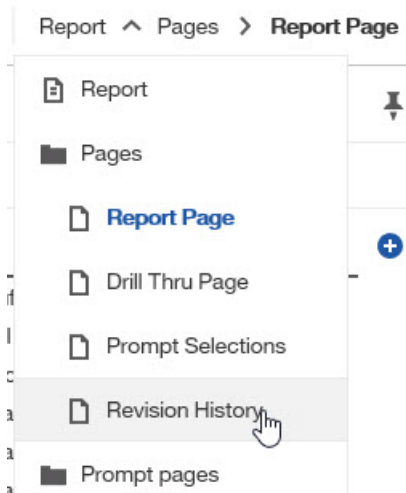


3. Select the **Company ID** in **Detail Filters** and select **Disabled** in the **Usage** field under **Properties** on the pane on the right. If the Properties pane does not display, click the **Properties** icon. Click **Save**.

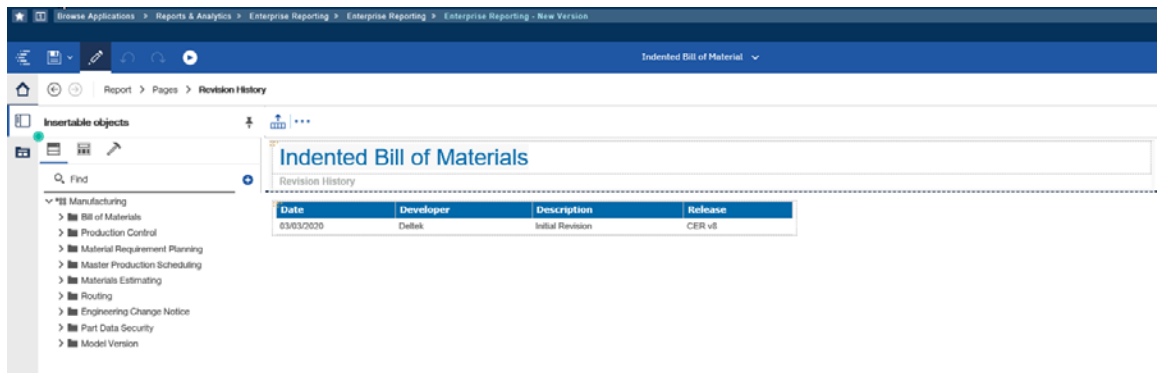


4. Optional but recommended: Add a line to the Revision History page to document this update. On the breadcrumb at the top, click **Report** and select **Revision History**.

Known Issues



- Optional: Add a row on the Revision History table and enter details of the change.



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

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