

## Deltek Costpoint Hot Fix Readme

*Release Date: March 29, 2019*

### FAR and Supplemental Regulation Library Enhancements

Costpoint now provides you the ability to import Federal Acquisition Regulation (FAR) and supplemental regulation library information into the Manage FAR Library and Manage Supplemental Regulations Library screens and tables. When you win work with new customers and need to upload large amount of data into these screens, this feature will facilitate the import process of data from an input file into Costpoint.

Also part of this feature is the addition of new fields to several screens in the Contracts domain so you can track additional information for FAR and supplemental regulation clauses/provisions linked to your contracts and/or subcontracts. This includes the option to automatically flow down FAR and supplemental regulation clauses from a contract to a subcontract record.

### Screen Updates

#### Manage FAR Library (CTMFAR)

The following new fields have been added to this screen to include more details about the FAR clauses/provisions that you maintain within Costpoint:

- **Required** — Select this check box if the FAR clause/provision number should be included when loading required rows only on the Manage Contracts and Manage Subcontracts screens.
- **Included** — Use this drop-down list to indicate whether the FAR clause/provision number and/or description should be printed on a purchase order or on a Costpoint Enterprise Reporting (CER) report. Valid options are **None**, **IBR** (Included by Reference), and **Full Text**.

**Note:** Printing of FAR clause/provision details on purchase orders will be included in a future enhancement in the Materials domain.

- **Risk Level** — Select the level of risk associated with the FAR clause/provision number. Valid options are **None**, **High**, **Medium**, and **Low**.
- **Description** — Enter the full description of the FAR clause/provision number.
- **Editable** — Select this check box to allow editing of the title and description of the FAR clause/provision number on the FAR Clauses/Provisions subtask of the Manage Contracts and Manage Subcontracts screens.
- **Effective Date** — Enter or select the effective date of the FAR clause/provision number.

- **Show in Lookup** — Keep this check box selected to display the FAR clause/provision number in the lookup of the **FAR Number** field on the FAR Clauses/Provisions subtask of the Manage Contracts and Manage Subcontracts screens. Only those numbers that are available in the lookup can be used for new records in Manage Contracts and Manage Subcontracts.
- **Notes** — Enter additional notes associated with the FAR clause/provision number.
- **Subcontract Flow-down** — Select the subcontract flow-down method for the FAR clause/provision number. Your selection determines whether the FAR clause/provision number from the contract (specified in the **Load Options** group box of the FAR Clauses/Provisions subtask of the Manage Subcontracts screen) will flow down to the subcontract record.

**Attention:** See the online help for more information about this field.

- **Subcontract Notes** — Enter notes about the subcontract that is already or will be associated with the FAR clause/provision. You can also add general subcontract notes for the clause.
- **Mitigation Type** — Select the mitigation type that applies to the FAR clause/provision number, which will be used for reporting purposes. Valid options are **None**, **Price**, and **Cost Impact**.
- **Mitigation Notes** — Enter notes associated with the mitigation for the FAR clause/provision number.

A new subtask, Import FAR/Supplemental Regulation Files, has also been added to this screen. Use this subtask to import FAR clauses/provisions from comma-separated files into the Manage FAR Library screen.

You must create an input file before using this subtask.

**Attention:** You can download the template CSV file (CTMFAR.CSV) from the Deltek Support Center site at <https://deltek.custhelp.com>.

There are two ways you can upload the input file:

- You can access the input file from the network by using alternate file locations.
- You can upload the input file to the Costpoint database.

If you choose the first option, click the **File Location** field on the Import FAR/Supplemental Regulation Files subtask to select an alternate file location. If you choose the second option, leave the **File Location** field blank and use the File Upload Manager to upload the input file to the Costpoint database.

When you import files and errors are found, Costpoint displays the Import FAR Library Error Report. Review the error report and fix the errors before re-uploading the input files. When you have successfully imported the input files, Costpoint updates the Manage FAR Library screen. You must save the record before the updates can be reflected in the respective database table.

**Attention:** See the online help for more information on using the Import FAR/Supplemental Regulation Files subtask of Manage FAR Library. The following topics are included in the online help of the screen:

- [Import FAR/Supplemental Regulation Files Subtask](#)
- [Step-by-Step Procedures on Importing Files](#)
- [Input File Information](#)
- [Error Messages](#)

## Manage Supplemental Regulations Library (CTMDFAR)

The following new fields have been added to this screen to include more details about the Defense Federal Acquisition Regulation Supplement (DFARS) and other supplemental regulation clauses that you maintain within Costpoint:

- **Required** — Select this check box if the clause number should be included when loading required rows only on the Manage Contracts and Manage Subcontracts screens.
- **Included** — Use this drop-down list to indicate whether the clause number and/or description should be printed on a purchase order or on a CER report. Valid options are **None**, **IBR** (Included by Reference), and **Full Text**.

**Note:** Printing of supplemental regulation clause details on purchase orders will be included in a future enhancement in the Materials domain.

- **Risk Level** — Select the level of risk associated with the clause number. Valid options are **None**, **High**, **Medium**, and **Low**.
- **Description** — Enter the full description of the clause number.
- **Editable** — Select this check box to allow editing of the title and description of the clause number on the Supplemental Regulations subtask of the Manage Contracts and Manage Subcontracts screens.
- **Effective Date** — Enter or select the effective date of the clause number.
- **Show in Lookup** — Keep this check box selected to display the clause number in the lookup of the **Clause Number** field on the Supplemental Regulations subtask of the Manage Contracts and Manage Subcontracts screens. Only those numbers that are available in the lookup can be used for new records in Manage Contracts and Manage Subcontracts.
- **Notes** — Enter additional notes associated with the clause number.
- **Subcontract Flow-down** — Select the subcontract flow-down method for the clause number. Your selection determines whether the clause number from the contract (specified in the **Load Options** group box of the Supplemental Regulations subtask of the Manage Subcontracts screen) will flow down to the subcontract record.

**Attention:** See the online help for more information about this field.

- **Subcontract Notes** — Enter notes about the subcontract that is already or will be associated with the supplemental regulation clause. You can also add general subcontract notes for the clause.
- **Mitigation Type** — Select the mitigation type that applies to the clause number, which will be used for reporting purposes. Valid options are **None**, **Price**, and **Cost Impact**.
- **Mitigation Notes** — Enter notes associated with the mitigation for the clause number.

A new subtask, Import FAR/Supplemental Regulation Files, has also been added to this screen. Use this subtask to import supplemental regulation clauses from comma-separated files into the Manage Supplemental Regulations Library screen.

You must create an input file before using this subtask.

**Attention:** You can download the template CSV file (CTMDFAR.CSV) from the Deltek Support Center site at <https://deltek.custhelp.com>.

There are two ways you can upload the input file:

- You can access the input file from the network by using alternate file locations.
- You can upload the input file to the Costpoint database.

If you choose the first option, click the **File Location** field on the Import FAR/Supplemental Regulation Files subtask to select an alternate file location. If you choose the second option, leave the **File Location** field blank and use the File Upload Manager to upload the input file to the Costpoint database.

When you import files and errors are found, Costpoint displays the Import Supplemental Regulations Library Error Report. Review the error report and fix the errors before re-uploading the input files. When you have successfully imported the input files, Costpoint updates the Manage Supplemental Regulations Library screen. You must save the record before the updates can be reflected in the respective database table.

**Attention:** See the online help for more information on using the Import FAR/Supplemental Regulation Files subtask of Manage Supplemental Regulations Library. The following topics are included in the online help of the screen:

- [Import FAR/Supplemental Regulation Files Subtask](#)
- [Step-by-Step Procedures on Importing Files](#)
- [Input File Information](#)
- [Error Messages](#)

## Manage Contracts (CTMCNTR)

The FAR Clauses/Provisions and Supplemental Regulations subtasks of this screen have been revised to display more details about FAR and supplemental regulation clauses associated with the contract, and also to accommodate several other changes brought about by updates to the Manage FAR Library and Manage Supplemental Regulations Library screens.

### FAR Clauses/Provisions Subtask

These are the changes to this subtask:

- **Load Required Rows Only** — Previously labeled as **Load Predefined Rows**, this check box now allows you to load only FAR clauses/provisions that have the **Required** check box selected on the Manage FAR Library screen.
- **FAR Number** — This field's lookup now includes only FAR numbers that have the **Show in Lookup** check box selected on the Manage FAR Library screen.
- **Title** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.
- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.

New fields added to the subtask include the following:

- **Risk Level** — This field defaults to the **Risk Level** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.
- **Subcontract Flow Down** — This field defaults to the **Subcontract Flow-down** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid values are **None**, **Optional**, **Required**, and **Not Required**.
- **Notes** — This field defaults to the **Notes** entered for the FAR clause/provision number on the Manage FAR Library screen, but can be edited.

### Supplemental Regulations Subtask

These are the changes to this subtask:

- **Clause Number** — This field's lookup now includes only clause numbers that have the **Show in Lookup** check box selected on the Manage Supplemental Regulations Library screen.
- **Title** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause on the Manage Supplemental Regulations Library screen.
- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause number on the Manage Supplemental Regulations Library screen.

New fields added to the subtask include the following:

- **Load Required Rows Only** — This check box allows you to load only supplemental regulation clauses that have the **Required** check box selected on the Manage Supplemental Regulations Library screen.
- **Risk Level** — This field defaults to the **Risk Level** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.
- **Subcontract Flow Down** — This field defaults to the **Subcontract Flow-down** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid values are **None**, **Optional**, **Required**, and **Not Required**.
- **Notes** — This field defaults to the **Notes** entered for the clause number on the Manage Supplemental Regulations Library screen, but can be edited.

## Manage Subcontracts (CTMSBCNTR)

The FAR Clauses/Provisions and Supplemental Regulations subtasks of this screen have been revised to display more details about FAR and supplemental regulation clauses associated with the subcontract, and also to accommodate several other changes brought about by updates to the Manage FAR Library and Manage Supplemental Regulations Library screens.

### FAR Clauses/Provisions Subtask

These are the changes to this subtask:

- **Autoload** — When you use the autoload function, the FAR clause/provision will automatically flow down from the selected contract ID to the subcontract record only if the FAR clause/provision's **Subcontract Flow-down** option is set to **Optional**, **Required**, or **Not Required** on the Manage FAR Library screen or on the FAR Clauses/Provisions subtask of the

Manage Contracts screen. If this option is set to **None**, the FAR clause/provision will not flow down to the subcontract record even if it is associated with the selected contract record.

- **Load Required Rows Only** — Previously labeled as **Load Predefined Rows**, this check box now allows you to load only FAR clauses/provisions that have the **Required** check box selected on the Manage FAR Library screen.
- **Applicable to Subcontract** — If you use the autoload function, this check box's default now depends on the **Subcontract Flow-down** option selected on the Manage FAR Library screen or on the FAR Clauses/Provisions subtask of the Manage Contracts screen:

Subcontract Flow-down option	Applicable to Subcontract check box default	Can Applicable to Subcontract check box be edited?
<b>Optional</b>	Selected	Yes
<b>Required</b>	Selected	No
<b>Not Required</b>	Clear	Yes

**Note:** If **Subcontract Flow-down** is set to **None**, the FAR clause/provision does not flow down from the contract to the subcontract record.

- **FAR Number** — This field's lookup now includes only FAR numbers that have the **Show in Lookup** check box selected on the Manage FAR Library screen.
- **Title** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.
- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the FAR clause/provision on the Manage FAR Library screen.

New fields added to the subtask include the following:

- **Included** — This field defaults to the **Included** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid options are **None**, **IBR** (Included by Reference), and **Full Text**.
- **Risk Level** — This field defaults to the **Risk Level** value selected for the FAR clause/provision number on the Manage FAR Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.
- **Notes** — This field defaults to the **Notes** entered for the FAR clause/provision number on the Manage FAR Library screen, but can be edited.
- **Subcontract Notes** — Enter additional notes associated with the subcontract.

### Supplemental Regulations Subtask

These are the changes to this subtask:

- **Autoload** — When you use the autoload function, the supplemental regulation clause will automatically flow down from the selected contract ID to the subcontract record only if the supplemental regulation clause's **Subcontract Flow-down** option is set to **Optional**, **Required**, or **Not Required** on the Manage Supplemental Regulations Library screen or on the Supplemental Regulations subtask of the Manage Contracts screen. If this option is set to **None**,

the supplemental regulation clause will not flow down to the subcontract record even if it is associated with the selected contract record.

- **Applicable to Subcontract** — If you use the autoloading function, this check box's default now depends on the **Subcontract Flow-down** option selected on the Manage Supplemental Regulations Library screen or on the Supplemental Regulations subtask of the Manage Contracts screen:

Subcontract Flow-down option	Applicable to Subcontract check box default	Can Applicable to Subcontract check box be edited?
Optional	Selected	Yes
Required	Selected	No
Not Required	Clear	Yes

**Note:** If **Subcontract Flow-down** is set to **None**, the supplemental regulation clause does not flow down from the contract to the subcontract record.

- **Clause Number** — This field's lookup now includes only clause numbers that have the **Show in Lookup** check box selected on the Manage Supplemental Regulations Library screen.
- **Title** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause on the Manage Supplemental Regulations Library screen.
- **Description from Contract** — You can edit this field only if the **Editable** check box is selected for the supplemental regulation clause number on the Manage Supplemental Regulations Library screen.

New fields added to the subtask include the following:

- **Load Required Rows Only** — This check box allows you to load only supplemental regulation clauses that have the **Required** check box selected on the Manage Supplemental Regulations Library screen.
- **Included** — This field defaults to the **Included** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid options are **None**, **IBR** (Included by Reference), and **Full Text**.
- **Risk Level** — This field defaults to the **Risk Level** value selected for the clause number on the Manage Supplemental Regulations Library screen, but can be edited. Valid values are **None**, **High**, **Medium**, and **Low**.
- **Notes** — This field defaults to the **Notes** entered for the clause number on the Manage Supplemental Regulations Library screen, but can be edited.
- **Subcontract Notes** — Enter additional notes associated with the subcontract.

## System Requirements

This enhancement requires the following:

- PATCH3605
- Common library - CTLIB (cp711\_cmplib\_CTLIB\_013.zip)

## Application JAR Requirements

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

Domain	Module	Application ID	Application Name	Application File
Contracts	Contracts	CTMCNTR	Manage Contracts	cp711_ctmcntr_014.zip
Contracts	Contract Management Controls	CTMDFAR	Manage Supplemental Regulations Library	cp711_ctmdfar_004.zip
Contracts	Contract Management Controls	CTMFAR	Manage FAR Library	cp711_ctmfar_003.zip
Contracts	Contracts	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_015.zip

More information about this release is on the following page.

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## Custom Programs Affected

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

## To Download the Hot Fix/Feature Update

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

## To Install the Hot Fix/Feature Update

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

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

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

## To Check to See if the Hot Fix is Installed

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

## To Check to See if the Feature is Installed

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

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

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## Appendix: For Additional Information

### Deltek Support Center

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

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

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

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

### Access Deltek Support Center

#### To access the Deltek Support Center:

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

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

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## About Deltek

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