



Deltek

# Deltek Costpoint® 8.2

Pre-Release Notes

**July 21, 2022**

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## Disclaimer

The scope of these pre-release notes is subject to change.

### **Important Notice**

These pre-release notes provide overview descriptions of enhancements planned for the upcoming Costpoint 8.2 release. This document lists the currently planned work, but the actual scope and contents could change prior to the release.

In addition, some features already defined in this document are not included in the 8.2 Early Adopters (EA) program. These features are planned for 8.2 and, barring changes, will be included in the 8.2 General Availability (GA) release. The feature description may also be revised or updated for GA.

Please use this document for guidance only.

## General

### **New Feature Engagements**

You can use engagements to learn about the key new features and enhancements in Costpoint 8.2.

Engagements bring new platform features to your attention and provide you with resources on how to use them for your firm's projects and operations. An engagement is a pop-up window that typically contains descriptions, videos, and links to more learning resources. You can view engagements on various pages in the platform that contain the new features. Each engagement is available only for a limited period, based on when the engagement's feature was released.

## Accounting

### Multi-User Report Printing

The Post Cash Disbursements screen now allows multiple users to print or preview the Cash Disbursements Report at the same time. Similarly, multiple users can simultaneously print or preview the Cash Receipts Journal on the Post Cash Receipts screen.

The posting process on both screens remains a single-user functionality; however, the posting can be submitted by multiple users simultaneously. Costpoint will queue the posting/commitment transactions and process them one at a time.

You have only the **Print/Post Cash Disbursements** and **Print/Post Cash Receipts** options as the **Post Cash Disbursements** and **Post Cash Receipts** options are no longer available. The reports generated from the Print/Post process will contain a unique sequencing number and should be retained if needed for historical purposes.

### Manage Cash Receipts Screen Enhancements

Several UI and functionality modifications are applied to the Manage Cash Receipts screen to provide you with a more ergonomic interface that can facilitate ease of use and streamlined operability.

Modifications include the following:

- The **Functional Currency Total** fields under the **Debit** and **Credit** columns are replaced by a single **Functional** field under the new **Line Total** column.
- The **Receipt Currency Total** fields under the **Debit** and **Credit** columns are replaced by three **Transaction** fields under the **Receipt Total**, **Line Total** and **Unidentified** columns.
- The Charge Distribution, Miscellaneous, and Functional Amounts tabs on the Cash Receipt Detail table window are removed and the fields in these tabs are moved to the main table window.
- The **Check** field, which currently supports only up to nine numbers, is updated to support up to 40 alphanumeric characters.
  - The Import Cash Receipts, Copy/Reverse Cash Receipts, Post Cash Receipts, View Receivables and Collections, Print Accounts Receivable History Report, Print Cash Receipts Edit Report, and Manage Accounts Receivable History screens are also updated to support the new **Check** format.
- The new Quick Cash Receipts report that displays cash accounts and offsetting accounts receivable invoices can be generated on the Manage Cash Receipts screen.
- A new **Notes** field is added to the Cash Receipt Detail table window.
  - The Post Cash Receipts screen is also updated to include the contents of the **Notes** field when posting cash receipts.
  - The View Receivables and Collections screen is also updated to include the **Notes** field.
- A Lookup that displays the invoice number, customer account, customer name, invoice amount, balance due, due date, and project is added to the **Invoice** field. If you enter or select a customer, the Lookup only displays invoices for that customer.

## Vendor Updates Through Supplier Portal

For Supplier Portal users, you can use the new Manage Vendors (SPMVEND) screen in the Materials domain, a simplified version of the same screen (APMVEND) in the Accounting domain, to view your profile and view or update your contacts, employees, and employee labor information. You can also attach documents and request changes to your profile through notes.

When you update a record through the Manage Vendors screen in Supplier Portal, the changes are reflected on the Manage Vendors screen in the Accounting domain.

The following screens are also updated to support this enhancement:

- Administration » Set Up Company
- Accounting » Configure Vendor Settings

## Intelligent Character Recognition for Voucher Creation

The Manage Accounts Payable Vouchers screen is integrated with an Intelligent Character Recognition (ICR) tool that allows you to create new vouchers by uploading electronic copies of invoices.

Once you upload an invoice, the ICR scans the contents of the file and automatically populates corresponding fields in Costpoint.

The Linked Content Files and Manage Application/Content Links screens are also updated to support this enhancement.

## Vendor Labor Subtask Enhancement in Manage Accounts Payable Vouchers

The Vendor Labor subtask on the Manage Accounts Payable Vouchers screen is updated to display a standard asterisk to the **Effective Billing Date** column header to indicate that the effective billing date is required.


## Adjust Currency Balances Screen Enhancements

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The Identification section, which contains the **Parameter ID** and **Description** fields, is added to the Adjust Currency Balances screen to enable you to create a new parameter ID or to retrieve a previously saved parameter ID, which serves as a template for screen selection parameters.

When you query a parameter ID, select a record in the table window and open the Adjust/Revalue subtask. Costpoint automatically populates the **Cash Account** fields on the Adjust/Revalue subtask using the **Cash Account**, **Cash Organization**, **REF\_1**, and **REF\_2** fields of the transaction record you selected.

Costpoint also populates the **Period** and **Subperiod** fields on the Adjust/Revalue subtask depending on the selection criteria you entered on the main screen.

When you click  in the **Revaluation Account** fields on the Adjust/Revalue subtask, the Lookup displays **Non-Project Accounts**, **Organizations**, **REF\_1** and **REF\_2** fields entered on the Manage Multicurrency Accounts screen for the currency entered in the **Selection Criteria** group box.

## Create Revaluation Entry Screen Enhancements

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The Account Non-Contiguous Ranges subtask is added to the Create Revaluation Entry screen to allow you to create revaluation entries for a non-contiguous range of accounts. With this subtask, you can create a non-contiguous range that consists of multiple contiguous ranges of accounts, a single account, or a combination of both.

You can only use this subtask if you select the new **Non-Contiguous Ranges** check box that is added to the **Account** group box.

## CRM & Contracts

### Activities Enhancements: Customers and Vendors

Previous functionality allowed you to associate customers and vendors to activities in the CRM & Contracts domain through the Resources subtask of the Manage Activities screen.

Costpoint 8.2 makes it easier for you to link, view, and track activities for customers and vendors by adding the Activities subtask to the Manage Contract Management Customer Info and Manage Contract Management Vendor Info screens. This change now allows you to manage activities associated with customers or vendors in a single location.

#### Manage Contract Management Customer Info (CTMCUST) and Manage Contract Management Vendor Info (CTMVEND)

**Warning:** Before you can use the Activities subtask on these screens, at least one contact must exist for the prospective or regular customer/vendor record. If there is no contact linked to the customer/vendor record and you click the Activities subtask, Costpoint displays an informational message and you will not be able to enter a record.

To enable the Activities subtask, you must create a record on the Address/Contact Info subtask as well as on the Contacts subtask.

In addition, a record must exist on the Resources subtask of the Activities subtask before you can save an activity record.

The Activities subtask added to these screens has the same functionality as the stand-alone Manage Activities screen. Here, you can:

- Create a new activity and link it to the customer/vendor. You can also link the same activity to an opportunity, contract, or subcontract record.
- Add tasks to the activity via the Tasks subtask.
- Associate the activity with another customer/vendor or other resources (such as employees or leads) through the Resources subtask.
- Add the activity or task to your Outlook calendar.
- View and manage all activities associated with the customer/vendor.

Activities you create on the Activities subtask in Manage Contract Management Customer Info and Manage Contract Management Vendor Info will be available within the Manage Activities screen and associated Activities subtasks. Similarly, activities associated with customer/vendor records through Manage Activities or the Activities subtask on the other screens will be available on the Activities subtask of Manage Contract Management Customer Info or Manage Contract Management Vendor Info.

#### Creating or Assigning Activity IDs

Similar to Manage Activities, when creating a new activity in the respective customer or vendor screen, you can either manually enter an activity ID or leave the **Activity ID** blank to have Costpoint automatically assign an ID if the **Auto-Assign Activity IDs** check box is selected on the Configure Contract Management Settings screen.

### Adding Activity/Task to Outlook Calendar

You can add the activity or task to your Outlook calendar by clicking the **Download Outlook (.ics)** button on the Activities or Tasks subtask. Note, however, that this button will be available only after you save the activity/task record and is visible only in Form view.

After you download the calendar (.ics) file, you can click the file on the browser window, or you can open it from your Downloads folder. You can save the file as is, or edit it before adding it to your Outlook calendar. The task or activity start and end dates, description, and other information are included in the file.

### Resources Subtask

You **must** take note of the following before saving an activity record on the Activities subtask or deleting a record on the Resources subtask:

- A record must exist on the Resources subtask before you can save a new activity. An error message displays when you try to save an activity with no Resources records.
- When you open the Resources subtask, a default record is automatically entered:
  - In Manage Contract Management Customer Info, the **Prospective Customer ID** or **Customer Account** value from the header screen defaults in the **Business ID** field. You must enter a value in the **Resource ID** field before saving the record on the Resources subtask.
  - In Manage Contract Management Vendor Info, the **Prospective Vendor ID** or **Vendor ID** value from the header screen defaults in the **Business ID** field. You must enter values in the **Resource ID** and **Seq No** fields before saving the record on the Resources subtask.
- When you try to delete the default record on this subtask, a warning message displays, informing you that deleting the default record will also delete the entire activity record.

## Activities Enhancements: New Fields and Updates to the Calendar File

New fields have been added to the Manage Activities screen to include start and end dates/times as well as the ability to mark an activity as an all-day event. These new items are also included in the downloaded calendar (.ics) file that you can add to your Outlook schedule.

### Manage Activities (CTMACTV)

The **Activity Date** field on the main screen has been removed and replaced by the following new fields.

Field	Description
<b>Start Time</b>	<p>Enter or select the start date for the activity. For new activity records, this field defaults to the system date, but you can edit it.</p> <p>In the unlabeled field to the right, enter the start time for the activity. For new activity records, this field defaults to the system time, but you can edit it. When you modify this time, Costpoint automatically adds 30 minutes to the end time, but the end time will still be editable.</p> <p>If the <b>All Day Event</b> check box is selected, only the start date can be edited. The start time is disabled and defaults to <b>12:00 AM</b>.</p>

Field	Description
<b>End Time</b>	<p>Enter or select the end date for the activity. For new activity records, this field defaults to the system date, but you can edit it.</p> <p>In the unlabeled field to the right, enter the end time for the activity. For new activity records, this field defaults to the system time, but you can edit it.</p> <p>If the <b>All Day Event</b> check box is selected, both the end date and end time are disabled. The end date defaults to the start date, and the end time defaults to <b>12:00 AM</b>.</p>
<b>All Day Event</b>	Select this check box to mark the activity as an all-day event. Selecting this check box disables the start time as well as the end date and end time.

This information is now included in the calendar file that you can download by clicking the **Download Outlook (.ics)** button. Note that this button is visible only in Form view and will become available after you save the activity record.

Validations are in place to check whether the end date and time are earlier than the start date and time so you can accurately set the duration of the activity.

**Note:** If you have existing records on the Manage Activities screen and you upgrade to Costpoint 8.2, the system will populate the **Start Time** and **End Time** fields with the date/time previously stored in the **Activity Date** field.

## Other Applications

Updates to the Manage Activities screen are also applied to the existing Activities subtask of the following screens:

- Manage Opportunities (CTMOPP)
- Manage Contracts (CTMCNTR)
- Manage Subcontracts (CTMSBCNTR)
- Manage Leads and Contacts (CTMLEAD)

The new Activities subtask added to the Manage Contract Management Customer Info and Manage Contract Management Vendor Info screens also reflects the enhancements made in Manage Activities.

## FAR/DFARS Annual File Creation

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This feature, which currently exists in Costpoint, gives you the ability to get updated lists of Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) clauses and provisions, and import these lists into Costpoint so that users can apply up-to-date clauses/provisions to contracts and subcontracts.



You can download the files from the Deltek Costpoint Document Resources page in Deltek Support Center: <https://deltek.custhelp.com/app/CPDocRes>.

The downloaded files will already be formatted as an input file that you can import into Costpoint using the Manage FAR Library and Manage Supplemental Regulations Library applications.

In Costpoint 8.2, files will be updated to the latest version, dated May 2022.

## GovWin IQ Enhancement: CMMC Information for Vendors

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The US Department of Defense (DoD) created the Cybersecurity Maturity Model Certification (CMMC) to safeguard information and protect it against cyber threats. The CMMC framework requires companies that handle national security information to comply with cybersecurity standards. Contractors dealing with sensitive unclassified DoD information are assessed and will be required to meet a specific CMMC level before a contract can be awarded.

**Attention:** For additional information on CMMC, refer to <https://www.acq.osd.mil/cmmc/about-us.html>.

Costpoint 8.1 added CMMC information to the Status tab of the Manage Opportunities screen to allow you to include CMMC details to opportunity records. If the opportunity came from GovWin IQ, the CMMC level information is populated from GovWin IQ into Costpoint.

Costpoint 8.2 expands this functionality to vendors and prospective vendors. For records manually created within Costpoint, you can now indicate the CMMC level for the specific prospective or regular vendor. For records imported from GovWin IQ, the vendor's CMMC level information will default from GovWin IQ.

This enhancement updates the following applications:

- Manage Contract Management Vendor Info (CTMVEND)
- Approve Prospective Vendors (CTMVENDA)
- Manage Vendors (APMVEND)
- Import GovWin IQ Vendor Data (APPIQVEN)
- Import Vendors (AOPUTLVU)

## GovWin IQ Enhancement: Canadian Bid Details for Opportunities

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Canadian bid information from GovWin IQ is now included in the data transfer when you import opportunities from GovWin IQ into Costpoint. This enables you to view the opportunity's total value,

expected contract value (**Our Value**), and weighted revenue in both the functional and CAD currencies. Additional fields are made available in Manage Opportunities to give more details on Canadian bid records imported from GovWin IQ.

## Manage Opportunities (CTMOPP)

On the Status tab, under the **Value and Key Dates** group box, there are now two columns (**Functional Currency** and **Transactional Currency**) to display opportunity values in the functional and CAD currencies.

Under **Transactional Currency**, the following fields have been added:

- **Transactional Total Value:** This field displays the total opportunity value in CAD. This value comes from GovWin IQ but can be edited.
- **Transactional Our Value:** Use this field to enter the contract value in CAD that you expect your company will earn should you be awarded the contract associated with the opportunity.
- **Transactional Weighted Revenue:** Costpoint calculates this field as Transactional Our Value × Win Probability.
- **Transaction Currency Code:** This field displays **CAD** and cannot be edited.

The following notice has also been added under the column labels:

“Currency Notice: Currency conversion done at time of publication.”

**Note:** In Form view, the **Transactional Currency** column and its corresponding fields as well as the **Currency Notice** are visible only for Canadian bid records from GovWin IQ. In Table view, these fields are visible but disabled if the transaction currency code is not CAD.

The GovWin IQ subtask has also been updated to add new fields in the **Details** group box. The following items are now available for Canadian bid records from GovWin IQ:

- **Estimated Value (CAD):** This field displays the potential value of the opportunity in CAD, as transferred from GovWin IQ.
- “Currency Notice: Currency conversion done at time of publication in GovWin IQ.”: This message displays to the right of **Estimated Value (CAD)**.
- **GSIN:** This field displays the Goods and Services Identification Number (GSIN) associated with the opportunity, as transferred from GovWin IQ. If the record already has a value in **UNSPSC**, this field will be blank.
- **UNSPSC:** This field displays the United Nations Standard Products and Service Code (UNSPSC) associated with the opportunity, as transferred from GovWin IQ. If the record already has a value in **GSIN**, this field will be blank.
- **Trade Agreements:** This field displays the Trade Agreements indicated for the opportunity, as transferred from GovWin IQ.

**Note:** These new fields are visible on the GovWin IQ subtask only for Canadian bid records imported from GovWin IQ.

## Import GovWin IQ Data (CTPIQDAT)

This application has been updated to include Canadian bid information when importing opportunity data from GovWin IQ into Costpoint.

## Manage Leads and Contacts Enhancements

Enhancements to the Manage Leads and Contacts application include new fields to store address information and other details, and the ability to load contact details from the header record into a new contact record on the Business Affiliations subtask.

### New Address Information Fields

The following fields have been added to the main screen to let you specify address information for the contact/lead record:

- Address Line 1
- Address Line 2
- Address Line 3
- City
- State/Province
- Postal Code
- Country

**Note:** In **Postal Code**, when you enter a value that has been used before, Costpoint will display the city, state/province, and country associated with the postal code. If you enter a postal code that has not yet been used, the system stores it in the POSTAL\_CD table along with the city, state/province, and country associated with it for future use.

None of these fields are required, but the details provided here may provide additional information for the lead/contact record. In addition, you can do queries for all lead/contact records based on these items.

### Other New UI Items

The **Do Not Contact** and **Do Not Email** check boxes have been added to the main screen for informational purposes only. For example, if the lead/contact does not want to be contacted further, you can use these check boxes to indicate that specific detail.

Note that selecting these check boxes will not disable the phone and email functionality of Manage Leads and Contacts.

### Load Contact Details from the Header into the New Contact

Costpoint 8.2 now allows you to load contact details from the header record into the new contact record created on the Business Affiliations subtask to eliminate data entry errors.

After you enter a new value in the **Contact ID** field (for customers) or **Line** field (for vendors) and tab out of the field, the **Load Contact Details** button becomes available. You can click this button to automatically load contact details from the header record into the following fields:

- First Name

- Last Name
- Phone Number
- Title
- Email

You can still manually enter a different value or modify these fields as needed.

**Note:** As before, you must enter a **Business Type**, **Business ID**, and **Address Code** before the **Contact ID** or **Line** field becomes available.

## More Options for Contract Customers/Contacts

To give you more flexibility in adding and managing customers and contacts linked to a contract through the Customers/Contacts tab of the Manage Contracts screen, several updates have been made to the following screens.

### Manage Functional Roles (SYMROLE)

Column headings on this screen have been updated to reflect the correct domain and module name:

Old Column Heading	New Column Heading
Contracts	CRM & Contracts
Subcontractors	Subcontractor Management

Five new system role codes are added to this application:

Role Code	Description
BILLCUST	Billing Customer
PRIMECUST	Primary Customer
CNTRREP	Contract Representative
PCO	Procurement Officer (PCO)
ACQCUST	Acquisition Customer

Description of the following codes are also updated:

Role Code	Old Description	New Description
ACO	Admin Contracting Officer	Administrative Contracting Officer (ACO)
COTR	COTR	Contracting Officer's Technical Representative (COTR)

The **CRM & Contracts** check box for these 7 roles as well as for the CO (Contracting Officer) functional role is automatically selected on this screen, but you can still change it. Note, however, that if you clear the **CRM & Contracts** check box for these roles, the roles will not be available on the Manage Contract Management Roles screen and, therefore, cannot be used within the CRM & Contracts domain.

## Manage Contract Management Roles (CTMROLES)

The following system roles from the Manage Functional Roles screen now display automatically in Manage Contract Management Roles, given their **CRM & Contracts** check box remain selected in Manage Functional Roles:

Role Code	Description
BILLCUST	Billing Customer
PRIMECUST	Primary Customer
CNTRREP	Contract Representative
PCO	Procurement Officer (PCO)
ACQCUST	Acquisition Customer
ACO	Administrative Contracting Officer (ACO)
COTR	Contracting Officer's Technical Representative (COTR)
CO	Contracting Officer

The **Customer** check box corresponding to these roles is selected by default, but you can clear it. Note, however, that when you clear this check box for a specific role, that role will not be available for use as a customer role on various screens in the CRM & Contracts domain.

## Manage Contracts (CTMCNTR)

The following are the changes made to the Customers/Contacts tab of this screen:

- The **Load All Contact Types** button has been removed.
- The following columns have been added to the table:
  - **Active:** Select this check box if the role is currently active. Multiple roles can have this check box selected.
  - **Primary:** Select this check box for the primary role. Only one role code/customer ID/contact ID combination can have the **Primary** check box selected.
- You can use the same role multiple times on this tab, but only one role code/customer ID/contact ID combination is allowed.
- The **Customer Name** is now displayed as a hyperlink that you can click to open the customer record on the Manage Contract Management Customer Info screen.

## New Fields for Opportunities, Contracts, and Subcontracts

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

New fields and several other changes are made to the following screens to allow you to determine who created and last updated opportunity, contract, and subcontract records, as well as link organizations to contracts and subcontracts.

### Manage Opportunities (CTMOPP)

Updates to the General tab of Manage Opportunities include the following:

- These new fields are now available on this tab:
  - **Created By:** This field displays the user ID of the person who created the opportunity record. The unlabeled field to the right of this field displays the date when the record was created.  
  
If the record was imported from GovWin IQ, these fields display the user ID of the person who marked the opportunity record in GovWin IQ for transfer to Costpoint, and the date that the record was imported into Costpoint.
  - **Modified By:** This field displays the user ID of the person who last modified the opportunity record. The unlabeled field to the right of this field displays the date when the record was last modified.
- Some fields have been repositioned to give you a better user experience.
- In the **Responsible Business Unit and Managers** group box, the name fields corresponding to the following fields are no longer editable:
  - Business Unit
  - Organization
  - Business Unit Lead

On the Status tab, the following changes have been made:

- **Stage:** This field's lookup now includes the **Sequence Number** column. Lookup entries are now also sorted based on this new column.
- **Notes:** This field now allows up to 99,999 characters to capture more information about the opportunity.
- **Number of Days Open:** This new field displays the number of days that the opportunity record has been open. You can use this field to determine if the opportunity needs to be reassessed or prioritized. Costpoint calculates this field as follows:
  - If the **Stage** assigned to the opportunity has a win or loss value (that is, **Win / Loss** in Manage Opportunity Stages is set to either **Win** or **Loss** for the stage code), number of days open is calculated as **Modified Date - Date Opened**.
  - If the opportunity's record status is **Inactive**, number of days open is calculated as **Modified Date - Date Opened**.
  - For any other scenarios, this field is calculated as **System Date Today - Date Opened**.

## Manage Contracts (CTMCNTR)

Similar to Manage Opportunities, this screen has the following new fields on the General tab:

- **Created By:** This field displays the user ID of the person who created the contract record. The unlabeled field to the right of this field displays the date when the record was created.
- **Modified By:** This field displays the user ID of the person who last modified the contract record. The unlabeled field to the right of this field displays the date when the record was last modified.

**Note:** The **Modified By** and **Date** fields replaced the **Date Last Modified** field on the General tab.

In addition, a new **Business Unit and Organization** group box is now available on the General tab with the following fields:

- **Business Unit:** Enter or select the business that you want to assign to the contract. If the contract is associated with an opportunity and that opportunity is already linked to a business unit, that business unit displays in this field by default.

The unlabeled field to the right of this field displays the business unit description.

- **Organization:** Enter or select the organization that you want to assign to the contract. If the contract is associated with an opportunity and that opportunity is already linked to an organization, that organization displays in this field by default.

The unlabeled field to the right of this field displays the organization name.

Minor updates to the General tab include the following:

- The Subcontract Administrator and Contract Administrator fields have been renamed to Subcontract Admin and Contract Admin, respectively.
- Some fields have been rearranged for a better user experience.

The Project Initialization subtask has been updated to take into account the new **Organization** field added to the General tab. When mass adding/updating projects using this subtask, Costpoint assigns the organization stated in the contract as the owning organization of the newly created/updated destination projects, even if the template project used in the process has a different owning organization. If the contract's **Organization** field is blank, the template project's owning organization will default in the destination projects.

On the Classification tab, the **Statement of Work** field now allows up to 99,999 characters so that you can include more details on the contract's statement of work.

On the Contract Info tab, the **CMMC Requirements** field has been added. You can use this field to enter the Cybersecurity Maturity Model Certification (CMMC) requirements related to the contract. If the contract record is linked to an opportunity, that opportunity's CMMC requirement information defaults in this field.

## Manage Subcontracts (CTMSBCNTR)

Updates to the General tab of this screen include the following new fields:

- **Organization:** Enter or select the organization that you want to assign to the subcontract. If you leave this field blank and you enter a value in the **Contract ID** or **Opportunity ID** field, the organization linked to the contract or opportunity defaults here.

If a value already exists in this field and you enter a **Contract ID** or **Opportunity ID** with an assigned organization, the value in this field will not be overwritten.

**Note:** If you have existing records and you upgrade to Costpoint 8.2, the organization assigned to the opportunity will be copied to the associated subcontract records. If the opportunity linked to the subcontract record has not been assigned an organization, the **Organization** field will remain blank.

- **Created By:** This field displays the user ID of the person who created the subcontract record. The unlabeled field to the right of this field displays the date when the record was created.
- **Modified By:** This field displays the user ID of the person who last modified the subcontract record. The unlabeled field to the right of this field displays the date when the record was last modified.
- **Primary Customer ID:** This field displays the primary customer ID from the contract record linked to the subcontract. The unlabeled field to the right of this field displays the primary customer name.

On the Scope of Work tab, the **Scope of Work** field now allows up to 99,999 characters to give you more space for the subcontract's scope of work details.

## Manage Business Units (CTMOPPBU)

Previously labeled as Manage Opportunity Business Units, this application has been renamed to Manage Business Units to reflect the use of business units not just in opportunities, but also in other areas of CRM & Contracts.

This application has also been moved from the Opportunities application group to the Contract Management Controls application group. You can now access this screen via the following path:

**CRM & Contracts » Contract Management Controls » Contract Management Controls » Manage Business Units.**

## Organization Security in CRM & Contracts

You now have the ability to enable and disable organization security for various applications in the CRM & Contracts domain. By using organization security, you can ensure that correct user access is applied to the logged-in user ID in accessing records. The organization security feature validates and filters records as authorized for the user ID.

Organization security is specific to companies, modules, and applications. To enable this feature for the logged-in company, select the **Apply Organization Security** check box on the Company Settings tab of the Configure System Settings screen. You can then apply organization security to specific modules and/or applications.

On the Activate/Inactivate Organization Security by Module screen, you can select the **Apply Org Security** check box for the specific module(s) and application(s). In CRM & Contracts, these are the modules and screens where organization security can be applied:

Module	Application
Activities	Manage Activities
Contracts	Manage Contracts
	Manage Subcontracts
	Print Contract Backlog Report



Module	Application
	Print Contract Vehicle Report Print Contracts by Administrator Report Print Vendor COI & NDA Expiration Report View Contract Financial Information View Subcontract Inquiry
Opportunities	Manage Organizational Conflict of Interest (OCI) Manage Opportunities Print Opportunity Current Pipeline Report Print Opportunity Days Open Report Print Opportunity Win Loss Report
Resources	Manage Contract Management Employee Info Manage Leads and Contacts

Once organizational security is enabled, the application considers the organization security profile and group settings configured for the logged-in user ID on the Manage Organization Security Profiles and Manage Organization Security Groups screens.

The organization is not a required field in CRM & Contracts. If organization security is activated and the organization field is blank, all users with security rights to the module and assigned an organization security profile will be able to see the records. If the organization field is not blank and organization security is enabled, users will have access only to records with an organization ID that matches the users' organization in the organization security profile.

## Performance Assessments for Contracts

Costpoint 8.2 allows you to document and manage performance assessments related to the contracts received from customers. You can include assessment reports, including those from the Contractor Performance Assessment Report System (CPARS), as well as non-regulated assessments. You can also view consolidated assessment ratings for each customer.

Three new applications have been created and new tabs are added to two screens for this enhancement.

The new screens are:

- Manage Performance Assessment Descriptions (CTMCADC):** Use this screen to view, enter, and maintain performance assessment descriptions. Six system-defined rating descriptions automatically display on this screen, but you can create additional descriptions. Each description describes an assessment factor (for example, Quality of Product or Service and Cost Control) that can help you evaluate your contracts better.
- Manage Performance Rating Codes (CTMCART):** Use this screen to view, define, and track rating codes that you can use in performance assessments related to contracts. Each code is designated a score, which ranges from **0** (NA) to **10** (Exceptional). There are six system-defined rating codes that automatically load on the screen, but you can add new ones.
- Manage Performance Assessment Formats (CTMCAFRM):** Use this screen to assign rating descriptions to an assessment format. There is one Costpoint-defined (**STANDARD**) format that

automatically loads on this screen, but you can create new formats. At least one rating description must be assigned to an assessment format before you can save the format.

After you have defined performance assessment descriptions, rating codes, and formats, you can manually enter performance assessment details on the new Performance Assessment tab on the Manage Contracts screen. On this tab, you can indicate the project, customer, and contractor representative related to the contract assessment. On the Assessment Details subtask of this tab, assessment factors (or assessment descriptions) are automatically loaded for the assessment format selected. You can then enter the rating code for each of these factors, and Costpoint will automatically calculate the total score for the assessment record.

On the Manage Contract Management Customer Info screen, a new Performance Assessment tab is now available. On this read-only tab, you can view all performance assessment records related to the customer you are currently accessing. This tab is visible only to regular customers and is hidden for prospective customers.

## Updated Vendor Exclusion Notification Message

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint has updated the exclusion notification message that displays on the following screens when you associate a record with a vendor that is on the System for Award Management (SAM.gov) exclusion list, or with a vendor employee who is linked to a vendor included in the exclusion list:

- Manage Opportunities
- Manage Contracts
- Manage Subcontracts

The exclusion notification message now provides more details about the exclusion, including the vendor ID, type of exclusion, active and termination dates of the exclusion, as well as the date the exclusion was last updated. The last updated date is the **Last GovWin IQ Synch** date on the Manage Vendors screen.

## De-Supported: Opportunities Quick View (CTMOPPM)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The Opportunities Quick View application has been de-supported in Costpoint 8.2. You can continue to add, manage, and track opportunity information through the Manage Opportunities screen.

## Planning

### General Enhancements to Project Budgeting

Features described in this section affect applications in Project Budgeting, New Business Budgeting, and Administration.

#### New Column for Describing Budget Cost Amounts

An **Explanation** column was added to the Amounts budget entry subtask in the following applications:

- Project Budgeting » Budget/EAC Processing » Project Budgets/EACs
- New Business Budgeting » Actions/Processing » New Business Budgets

Use the **Explanation** column to enter a description, purpose, or general explanation of the associated cost for any option selected from the **Amounts Type** list, such as Travel, Materials, Vendor, and so on.

#### Explanation Column Added to Reports

The **Explanation** column was added to various Project Budgeting and New Business Budgeting reports, including the following:

- Project Budgeting » Active Level Reports
  - Raw Cost Breakdown
  - Burdened Cost Breakdown
  - Revenue Breakdown
  - Revenue Analysis
- New Business Budgeting » Reports/Inquiries
  - Multi-New Business Budget Consolidation (Revenue/Cost)
  - New Business Budget Summary (Revenue/Cost)
  - Structured New Business Budget Summary (Revenue/Cost)

#### Related Changes for Business Intelligence Reporting

The Report Table Update Process application (**Administration » Administration Utilities**) was also updated so that the **Explanation** field is also available to users of Business Intelligence.

## Application Added for Maintaining Org/Project Budget Security

A Manage Project Org Based Security application (**Administration » Administration Controls**), which simplifies the process of maintaining budget security, was added. For example:

Project *	Project Name	User ID *	User Name	Reporting	Creating	Approving	Modified By
20001.01	GSA Schedule #1 HW Sales	ACORIZA		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	ADMIN		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	AFCCT10012	Zorrick, Michael M	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	AFCPMGP014	Zales, Joseph I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	AMIE	Alexander, Damien D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	ARZEN535445	Alexander, Damien D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	ARZEN_CP	Alexander, Damien D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	ARZEN_LLCC	Fieldings, Winslow E	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	BPADMIN	Fieldings, Winslow E	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	BPTTESTUSER	Fieldings, Winslow E	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	BUDGET	Saint Claire, Marie A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	CHELLE	Rochelle Dominguez	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	CPADMIN	Davenport, Shawn L	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	CPADMIN2	CPADMIN2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
20001.01	GSA Schedule #1 HW Sales	CPADMIN3	CPADMIN3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

**Note:** This summary description will be supplemented with additional content in the near future.

## Enhancements to New Business Budgeting

The New Business Budgeting module was enhanced as follows:

- The functionality associated with the **Probability %** field was expanded.
- Columns related to opportunities were added.
- A Project Manager field was added.
- Certain interface elements were updated to be compatible with web services.
- The Funding subtask was renamed to “Value.”

## Enhancements to the Probability Functionality

The **Probability** field in the **Status** section of New Business Budgets was updated to display a default value of 100%. The value is editable, and existing values other than zero are not overwritten.

In addition, the percent value in this field is now also applied to:

- Cost and revenue amounts that are uploaded from new business budgets to organization budgets/outlooks. The default value (100%) is applied if no other value exists.
- Key reports within Organization Budgeting, New Business Budgeting, and Business Intelligence.

**Note:** Although additional, general details on changes related to this enhancement are described within this section, note that content in this area is still under development.

### Organization Budgeting Updates

An **Apply % Probability to New Business Budgets** check box was added to the Organization tab of Configuration Settings (**Administration » Administration Controls**).

When this check box is selected, the probability percent value in New Business Budgeting is applied to revenue and cost amounts in Organization Budgeting when you:

- Upload new business budgets to Organization Budgeting using the Mass Upload Project Budgets to Organization Budgets application (**Organization Budgeting » Controls and Utilities**).
- Run the following reports:
  - Rate Processing/Reports » Rate Analysis by Project
  - Profit and Loss Reports » Profit and Loss by Project
  - Labor Analysis Reports » Org Job Summary
  - Plug Processing and Reports » Plug Project Review

**Note:** If **Apply % Probability to New Business Budgets** is not selected, revenue and costs are always calculated at the default probability value of 100%.

### New Business Budgeting Updates

An **Apply % Probability** check box was added to reports within New Business Budgeting. When this check box is selected, budget amounts calculate based on the percent in the **Probability %** field of the New Business Budgeting screen. If **Apply % Probability** is not selected, budgeted values display at 100%.

Affected applications in **New Business Budgeting » Reports/Inquiries** include:

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

### Related Changes for Business Intelligence Reporting

The Report Table Update Process application (**Administration » Administration Utilities**) was updated so that the **Apply % Probability** field is also available to users of Business Intelligence.

## Added Opportunity Value and Estimated Value Fields to New Business Budgets

To establish a revenue ceiling value, two columns, **Opp Value** (Opportunity Value) and **Est Value** (Estimated Value), were added in the New Business Budgets Status section of the New Business Budgets screen (**New Business Budgeting » Actions/Processing**).

The table below describes these new columns.

Column	Description
<b>Opp Value</b>	<b>Opportunity Value.</b> If the New Business Budget is linked to a Contract Opportunity, the field under this column is populated with the amount entered in the <b>Our Value</b> field on the Status tab of the

Column	Description
	Manage Opportunities ( <b>CRM &amp; Contracts » Opportunities » Opportunities</b> ) screen. Should the <b>Our Value</b> amount change, such change will be reflected in the <b>Opp Value</b> field the next time a new business budget is committed.
<b>Est Value</b>	<p><b>Estimated Value.</b> All the fields under this column are editable. You can enter amounts as follows:</p> <ul style="list-style-type: none"> <li>▪ If the New Business Budget is linked to a Contract Opportunity and the value from the <b>Our Value</b> amount is at a higher level of the budget than the budgeting level, you can edit the <b>Est Value</b> at the budgeting level to distribute the value amount to lower levels.</li> <li>▪ If the New Business Budget is not linked to a Contract Opportunity, you can enter amounts at the budgeting level, and these amounts will roll up to the higher levels of the budget.</li> <li>▪ The amount in this field will also display in the <b>Value</b> column on the Value subtask (formerly named Funding).</li> </ul>

## Project Manager Field Added

A **Project Manager** field was added to the New Business Budgets Status section of the New Business Budgets application.

The value you enter at the top level automatically populates the lower-level budgets, but the field is editable at all levels.

The field was also added to all reports under **New Business Budgeting » Reports/Inquiries**.

## Budget Action Check Boxes Converted to List Items

An **Actions** drop-down list, which replaces three existing budget action check boxes, was added to the New Business Budgets Status section of the New Business Budgets application.

The removed check boxes now display as items in the **Action** drop-down list and include:

- Create Budget
- Modify Budget
- Commit Budget

**Note:** Standard rules for creating, modifying, or committing a budget apply.

The interface changes described above are related to an ongoing effort to make the Costpoint Planning budgeting applications more compatible with web services.

## Interface Updates to Project Budgets/EACs

The Project Budgets/EACs application interface was updated as follows:

- Budget action buttons were converted to items on a new **Actions** drop-down list.

- Subtasks for budgeting labor and expenses were consolidated under two new subtasks.
- The Project Labor Categories subtask includes new subtask tables for resource billing rates.

## Budget Action Check Boxes Converted to List Items

An **Actions** drop-down list, which replaces three existing budget action check boxes, was added to the **Project Budget Status** section of the Project Budgets/EACs application.

The removed check boxes now display as items on the **Action** drop-drop down list and include:

- Create Budget
- Create EAC
- Modify
- Commit

**Note:** Standard rules for creating, modifying, or committing a budget apply.

The interface changes described above are related to an ongoing effort to make the Costpoint Planning budgeting applications more compatible with web services.

## Budget Subtasks Consolidated

To simplify entry of budget details, multiple subtasks were consolidated under two new subtasks: Hours and Amounts.



The table below shows which subtasks were consolidated.

New Subtask	Subtasks Consolidated
<b>Hours</b>	<ul style="list-style-type: none"> <li>▪ Staff Hours</li> <li>▪ Subcontractor Hours</li> <li>▪ Consultant Hours</li> </ul>
<b>Amounts</b>	<ul style="list-style-type: none"> <li>▪ Materials</li> <li>▪ Subcontractor</li> <li>▪ Material Handling</li> <li>▪ Travel</li> <li>▪ Consultant</li> <li>▪ Other</li> </ul>

The consolidated subtasks, shown in the second column above, now display as drop-down list items on the new subtasks in the first column. For example:

Hours Subtask Table		Amounts Subtask Table	
Hours Type *	ID Type *	Amounts Type *	ID Type *
Staff Hours	Employee	Subcontractor	Vendor
Staff Hours	Employee	Subcontractor	Vendor
Staff Hours	Employee	Subcontractor	Vendor
Staff Hours	Employee	Subcontractor	Vendor
Staff Hours	Employee	Subcontractor	Vendor

Hours Type *	ID Type *	Amounts Type *	ID Type *
-Select-	-Select-	-Select-	-Select-
-Select-	-Select-	Materials	Contract Employee
Staff Hours	Contract Employee	Subcontractor	Employee
Subcontractor Hours	Employee	Material Handling	General Labor Category
Consultant Hours	General Labor Category	Travel	Generic Staff
	Generic Staff	Consultant	Key Entry
	Key Entry	Other Direct Cost	Project Labor Category
	Project Labor Category		Vendor
	Vendor		Vendor Employee
	Vendor Employee		

In the first column of either subtask, first select a category (formerly a subtask) for the hours or amount you want to budget, and then from **ID Type**, select the specific type.

**Note:** The images above display all the possible values just for reference. After you select a value from **Hours Type** or **Amounts Type**, the **ID Type** drop-down list displays only options relevant for that category.

Lookup values for all other columns in the table (such as, Name, Acct ID, Org ID) also filter based on the values you select in the first two columns. For example:

Hours Type *	ID Type *	ID *	Name *	Acct ID *	Org ID *	GLC/PLC	Hr Rate	Rev	Brd	12/31/06
Staff Hours	Employee	1093	Adkins, Steve	50-100-20	10.10.2.3	HEFM	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00
Staff Hours	Employee	1072	Barnes, Victor	50-100-10	10.10.2.3	HEFM	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00

## Project Labor Categories Subtask Enhancement

The Project Labor Categories subtask includes two new subtask tables where you can add billing rates for employee and vendor resources. For example, add:

- Employee and contract employee resources and rates to the Employee Billing Rates Schedule table.
- Vendor and vendor employee resources and rates to the Vendor Billing Rates Schedule table.

**Note:** This summary description will be supplemented with additional details in the near future.



## Update to Profit and Loss Statement Report

The Profit and Loss Statement Report, a feature added in Costpoint 8.1, was updated in 8.2 to include the following new sections.

- **Organization Source (Rev):** This allows the selection of either Performing or Owning to generate a report with revenue as Organization Source.
- **Organization Source (Cost):** This allows the selection of either Performing or Owning to generate a report with cost as Organization Source.
- **Details:** This allows report generation using either the Combined or Summary option, or both.

This update also makes the Profit and Loss Statement Report screen consistent with other Org P&L reports. Go to **Organization Budgeting » Profit and Loss Reports » Profit and Loss Statement** to check out and use the added sections.

## New Columns and Subtask for Tracking Pending Costs

To enhance the accuracy of cost forecasting, the Hours and Amounts subtasks (Staff Hours) of the Project Budgets/EACs screen (**Project Budgeting » Budget/EAC Processing**) was updated with two new columns and a subtask for displaying pending cost details on Working status EACs.

**Note:** As part of the 8.2 release, several subtasks, including Staff Hours, were consolidated into two new subtasks: Hours and Amounts.

Specifically, these new options include:

- **Total Inc Pending:** This column displays the EAC amount plus the current pending charges.
- **Pending:** This column displays only the pending charges.
- **Pending Details:** This subtask links directly to the Pending Charges report.

**Note:** The new columns and subtask only display on EACs, not budgets, and details will only populate if the EAC has a status of Working.

## New UI Profiles for Streamlining Workflows

In the Manage User Interface Profiles application (**Admin » System Administration » Workspace Customization**), two UI Profile IDs were added:

- DEFAULT\_ORG\_MGR with UI Profile Name Org Manager Profile
- DEFAULT\_PROJ\_MGR with UI Profile Name Project Manager Profile

Click the **My Menu** subtask to view the setup information of these new UI profiles.

## Enhanced Project Status Report

The Project Status report (**Project Budgeting » Supplemental Reports**) was updated to include additional information relevant to project budgets, variances, and cost percentages.

The table below describes the screen updates.

Screen Section	Update
<b>Top</b>	The <b>Budget Type</b> section label was changed to <b>Total Budget Type</b> . The option you select in this section, either <b>Budget</b> or <b>EAC</b> , controls the value that displays in the <b>Total Bud/EAC</b> column.
<b>Header</b>	A <b>Created Date</b> field was added. This non-editable field reflects the actual date on which the budget or the EAC was created.
<b>Summary Detail</b>	<p>Changes to this section include:</p> <ul style="list-style-type: none"> <li>▪ <b>New Columns</b> <ul style="list-style-type: none"> <li>▪ Cur Pd Budget</li> <li>▪ Cur Pd Variance</li> <li>▪ YTD Budget</li> <li>▪ YTD Variance</li> <li>▪ Total Bud/EAC</li> <li>▪ Balance Remaining</li> </ul> </li> <li>▪ <b>New Rows</b> <ul style="list-style-type: none"> <li>▪ Percent of Budgeted Costs</li> <li>▪ Percent of Funded Value</li> <li>▪ Percent of Contract Value</li> <li>▪ Percent of Time Elapsed</li> </ul> </li> </ul>

## Enhancement to Funding Ceiling Overrides

When you override the funding ceiling for a project budget or EAC (such as for at-risk projects), you can now also enter a specific override amount in a new **By How Much?** field, located on the **Revenue Setup/Ceilings » Revenue Setup** subtask of the Project Budgets/EACs screen.

The amount in **By How Much?** is added to any existing amount in the **Ceiling** field on the Revenue Analysis subtask, or if **Ceiling** is empty, the amount entered in **By How Much?** becomes the new ceiling.

The amount entered in **By How Much?** is also reflected in the following Project Budgeting reports:

- Active Level » Revenue Analysis
- Supplemental Reports » Project Status

**Note:** This summary description will be supplemented with additional content in the near future.

## Revenue Information Added to Project Budgets

For a better period by period analysis, revenue information is now integrated into the Burdened Cost subtask of project budgets on the Project Budgets/EACs screen (**Project Budgeting » Budget/EAC Processing**).

While the functionality of the subtask remains the same as the current version, there are additional changes that further enhance the 8.2 release. The table below lists these changes.

Costpoint 8.1	Costpoint 8.2
Screen name: Project Select	Screen name: Project Budgets/EACs
Subtask-level Report: Burdened Cost	Subtask-level Report: Analysis by Period
None	Revenue drill-down items <ul style="list-style-type: none"> <li>▪ TOTAL REVENUE BEFORE CEILING ADJUSTMENTS</li> <li>▪ FIXED REVENUE</li> <li>▪ OVER CEILING - FUNDING</li> <li>▪ Revenue Adjustments</li> <li>▪ EAC ADJUSTMENTS</li> <li>▪ Hours Ceilings</li> <li>▪ Direct Cost Ceiling</li> <li>▪ Burden Fee Override</li> </ul>
None	Additional rows: <ul style="list-style-type: none"> <li>▪ Total Expense</li> <li>▪ Profit</li> <li>▪ Profit % on Cost</li> <li>▪ Profit % on Revenue</li> </ul> Note that only applicable adjustments to the project budget will populate these rows.

## New Create Top Level Budget/Outlook Application

To upload higher level budgets like Labor, Non-Labor, and Revenue to top level Org Budgets seamlessly, the new Create Top Level Budget/Outlook application was added to Organization Budgeting.

From the application screen, you can select either **Top Level Budget** or **Top Level Outlook**.

By default, **Top Level Outlook** is selected. The description displays along with three parameters and required fields.

- Budget Year
- Actuals Through
- Top Level Org

When **Top Level Budget** is selected, the description displays along with two parameters and required fields.

- Budget Year

- Top Level Org

A **Create** button is located right below the fields. Click this button to create a top-level budget or outlook.

Take note of the following when using this application:

- Create Top Level Org Budgets before uploading from Project Budgets.
- The top-level budget will capture any uploaded revenue or costs from project budgets that exist at a higher level than the Org Budgeting level.
- You may only create **Top Level Org Budgets** through the Create Top Level Budget/Outlook application. However, you can delete them in the Organization Budgets/Outlooks screen (**Organization Budgeting » Budget/Outlook Processing**).
- The top-level budget status is **Rollup Bud**. The **Owner** and **Modified By** items also use **Rollup Bud** as status.
- The **Complete** and **Approved** check boxes are system-checked and are not editable.

## Default Burden Template Configuration Enhancement

The Project tab of the Configuration Settings screen was updated with a **Default Burden Template** field that enables Administrators to set any burden template as the default version.

Prior to this enhancement, the default template was set by the system and could not be changed.

The new configuration setting still defaults to the current template (also named Default), which is based on the Costpoint FY Pool Configuration. However, if a different template is selected, that one becomes the new default value for any Working status budgets created or imported in the following applications:

- Project Budgeting » Budgets EAC/Processing » Project Budgets/EACs
- New Business Budgeting » Actions/Processing » New Business Budgets
- New Business Budgeting » Controls and Utilities » Import New Business Budgets from Excel

As before, users can select a template other than the default version from within the above applications.

### [Related Update to Project Budget/EACs Mass Utilities](#)

The Project Budget/EACs Mass Utilities application (**Project Budgeting » Controls and Utilities**) was updated with a new **Burden Template** button. Click this button to change the default burden template for all selected Working status budgets.

The default template is the same one selected from **Default Burden Template** in Configuration Settings.

## Projects

### Ability to Split Labor and Non-Labor Fees in Billing

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

In previous Costpoint versions, there was an inconsistency between billing and revenue calculations for Cost Plus Fee On Cost (CPFC) formulas. When computing revenue, users can select different fee amounts for labor and non-labor accounts. In billing calculations, on the other hand, users would need to set up cost fee overrides for each account charged to the project in order to maintain a different fee for labor and non-labor accounts. The latter is labor intensive and also prone to errors.

To address the issue, Costpoint 8.2 allows you to split labor and non-labor fees in billing. You no longer need to set up fee overrides as you can now select different fee percent values for labor and non-labor accounts on the Manage Project Billing Information screen. Several other applications are also updated to reflect changes in calculations and to separately print labor and non-labor fees on screens and bills.

#### Manage Project Billing Information (BLMINFO)

On the Setup Information tab of this screen, the **Billing Formula** description for CPFC has been updated from **Cost Incurred Plus Fee on Cost** to **Cost Plus Fee On Cost** for consistency with the CPFC revenue formula description.

When you select the CPFC billing formula, the **Billing Parameter 1** and **Billing Parameter 2** fields now display **Labor Fee Pct.** and **Non-Labor Fee Pct.**, respectively, and you can enter separate fee values for labor and non-labor.

**Note:** Previously, the CPFC billing formula stored only one **Fee Percent** value on this screen. When you upgrade to Costpoint 8.2, the **Fee Percent** value for old records will be copied over to both the **Labor Fee Pct.** and **Non-Labor Fee Pct.** fields.

For these records, you will continue to see the historical fee as a combined fee value in both fields unless you modify **Labor Fee Pct.** and **Non-Labor Fee Pct.** on this screen. Alternatively, you can edit the billing history tables and manually separate the historical fee amounts for labor and non-labor accounts to break out the fees on your invoices.

The following tables have been updated to store the updated billing formula and the separate labor and non-labor fee percentages:

- S\_BILL\_FORMULA
- PROJ\_BILL\_INFO

#### Manage Project User Flow (PJMBASIC)

The same updates made for Manage Project Billing Information are applied to the Proj Bill Info subtask of Manage Project User Flow.

## Mass Add Project Master Data (PJPMADD)

This application is updated to incorporate the changes made in Manage Project Billing Information when adding or updating projects and **Project Billing Info** is selected in the **Include** group box.

## Calculate Standard Bills (BLPGBILL) and Calculate Retroactive Bills (BLPRBIL)

Both applications have been updated such that the labor fee and non-labor fee percentages indicated in Manage Project Billing Information for the CPFC billing formula are correctly included when computing standard and retroactive bills.

The following tables have also been updated to store labor and non-labor fee amounts as computed by the two screens:

- BILL\_EDIT\_DETL
- BILL\_EDIT\_INVC\_HDR

## Manage Standard Bills (BLMGBILL)

In the Standard Bill Details table window, the **Total Fee** group description now has separate rows for **Fee** and **Labor Fee** to display non-labor and labor amounts, respectively.

## Post Standard Bills (BLPGEN)

Post Standard Bills has been updated to ensure that the bills are posted correctly with the same or different labor and non-labor fees.

The following tables have also been modified to accommodate the updates for this enhancement:

- AR\_DETL\_HS
- AR\_HDR\_HS
- BILL\_EDIT\_DETL\_CUM
- BILL\_EDIT\_HDR\_CUM
- BILL\_INVC\_HDR\_HS
- BILLING\_DETL\_HIST
- BILLING\_SUM
- FS\_SUM
- GL\_DETL
- GL\_POST\_SUM
- PROJ\_BILL\_HS

If you are using Accounting Classification Reference Number (ACRN) bills and reference numbers, note that the following tables have also been updated:

- PROJ\_ACRN\_DETL
- PROJ\_ACRN\_DETL\_CUM
- PROJ\_BILL\_ACRN
- PROJ\_BILL\_ACRN\_CUM

- REF\_SUM

## Print Billing Worksheet (BLRBILLW)

Labor and non-labor fees are now printed in separate rows in the Billing Worksheet when the billing formula selected on the screen includes **Cost Plus Fee On Cost (CPFC)**. Labor fees display on the **Labor Fee** line, while non-labor fees display on the **Fee** line.

## Print Standard Bills (BLRMBIL)

When printing an invoice where the billing formula is set to **Cost Plus Fee On Cost (CPFC)**, Costpoint now prints labor and non-labor fees in separate rows in standard bills. Labor fees display on the **Labor Fee** line, while non-labor fees display on the **Fee** line.

## Reverse Previous Bills (BLPREVB)

This application is updated to make sure that the reversal amounts populate the correct fields when reversing a standard bill that contains labor and non-labor fees.

Affected tables for this update include:

- BILL\_EDIT\_DETL
- BILL\_EDIT\_INVC\_HDR
- OPEN\_BILLING\_DETL (The system updates this table once the reverse bill is actually posted.)

## Import Project Master Data (PJPPREP)

Import Project Master Data has been updated such that labor and non-labor fees are correctly imported from an input file into Costpoint when S\_BILL\_FORMULA\_CD is set to CPFC.

There are no changes in the input file layout of the PROJ\_BILL\_INFO.csv file. The following existing columns will store the labor and non-labor fee percent values:

- **BILL\_CALC\_AMT**: This will store the labor fee percent.
- **BILL\_CALC1\_AMT**: This will store the non-labor fee percent.

## Historical Data Updates

To ensure that the cumulative amounts for labor and non-labor fees for bills using CPFC are correctly reported and presented on invoices moving forward, the following billing history tables have been updated:

- BILLING\_DETL\_HIST
- BILLING\_SUM
- BILL\_EDIT\_DETL\_CUM (When the bill is posted.)

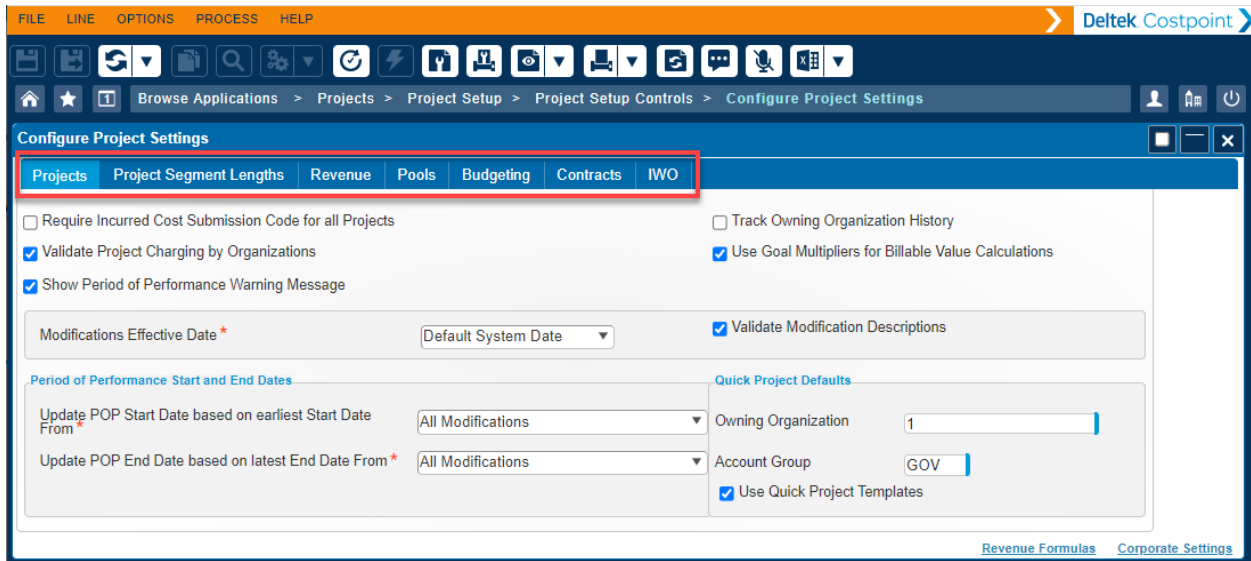
Historical billing transactions are displayed on the following screens:

- Manage Billing History (BLMBHIST)
- Manage Closed Billing Detail (BLMCLOSE)

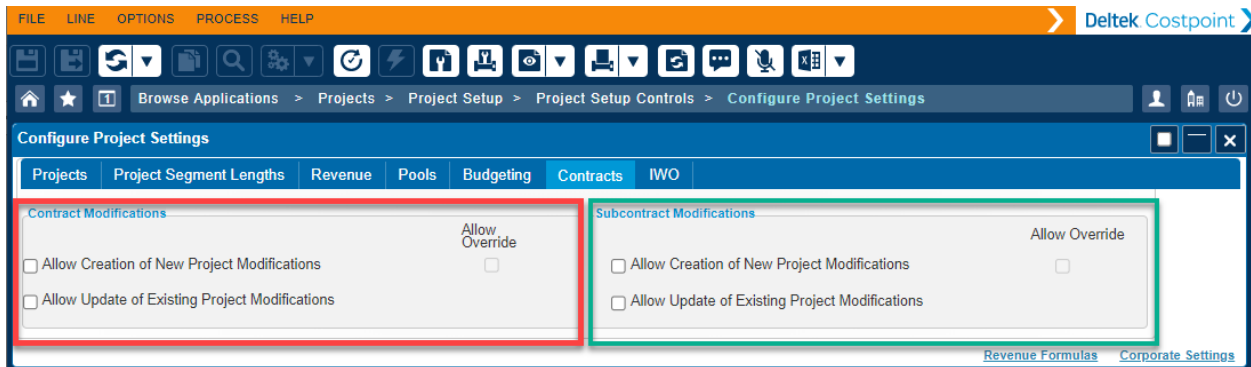
## Configure Project Settings Updates

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This screen's UI has been updated to give you a cleaner, more organized look of the available settings. Options are now divided into different tabs. The Contracts and IWO tabs are hidden if you are not licensed for the CRM & Contracts domain and the Inter-Company Work Orders module, respectively.



On the Contracts tab, options for **Contract Modifications** are now separated from **Subcontract Modifications** to allow you to set up settings for contract modifications independent of the setup used in subcontracts. This can help you avoid issues as the two areas could have different processes.



## Multi-User Reports

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.



This feature allows multiple users to post standard bills at the same time. It also enables simultaneous processing of standard bill reversals.

Both the Post Standard Bills and Reverse Previous Bills applications now have a **Place in queue** indicator that lets you know how many processes are ahead of you in the queue, and a **Run in background** link that you can click to run the process in the background. Each screen has a dedicated queue for interactive and background processing that you can view on the Manage Job Queues or View Action and Report Status screen.

## Post Standard Bills (BLPGEN)

In this application, multiple users can now print, preview, or post standard bills at the same time. Note, however, that depending on the workstations or Costpoint instances being accessed and the projects/invoices being previewed, printed, or posted, some processes in the queue may or may not be allowed or are prioritized over other processes (see the table below).

Users will have only the option to **Print/Post Standard Bills** as the **Post Standard Bills** option is no longer available. The report generated from the Print/Post process will contain a unique sequencing number and should be retained if needed for historical purposes.

For printing or previewing bills, multiple users will be able to run the process regardless of the projects or invoices being posted. For a single user that is logged on in multiple workstations, on the other hand, attempting to preview or print bills will result in an error, whether or not the same projects or invoices are being posted.

When running the print/post process, the result will depend on whether the same or different projects/invoices are being posted. This applies to multiple users as well as to a single user accessing different Costpoint instances.

The following table lists the common scenarios when running the Post Standard Bills application and their expected results.

No. of Users	Action	Result
Multiple users	Print preview, same projects/invoices	Allowed
Multiple users	Print preview, different projects/invoices	Allowed
Multiple users	Print only, same projects/invoices	Allowed
Multiple users	Print only, different projects/invoices	Allowed
Single user, logged on in multiple workstations (Costpoint instances)	Print preview, same or different projects/invoices	Error: "You are already working with it on another workstation."
Single user, logged on in multiple workstations (Costpoint instances)	Print only, same or different projects/invoices	Error: "You are already working with it on another workstation."

No. of Users	Action	Result
Multiple users	Print/post, same projects/invoices	Allowed, but only the first batch in the queue will be posted. For the second and succeeding postings, the process will complete, but no journal will be produced.
Multiple users	Print/post, different projects/invoices	Allowed. All batches in the queue will run and journals will be produced.
Single user, different Costpoint instances	Print/post, same projects/invoices	Allowed, but only the first batch in the queue will be posted. The second and succeeding batches will have nothing to post, and no journal will be produced.
Single user, different Costpoint instances	Print/post, different projects/invoices	Allowed. All batches in the queue will run and journals will be produced.

## Reverse Previous Bills (BLPREVB)

On this screen, multiple users can now run the process at the same time.

The following table lists the common scenarios when running Reverse Previous Bills and their expected results.

No. of Users	Same or Different Invoices	Result
Multiple users	Same invoice	Allowed, but only the first invoice in the queue will be reversed. The others will return the following message: "There is no billing history data for the invoice or selected invoices exist."
Multiple users	Different invoices	Allowed. Both will be processed through the queue.
Single user, different Costpoint instances	Same invoice	Allowed, but only the first invoice in the queue will be reversed. The others will return the following message: "There is no billing history data for the invoice or selected invoices exist."
Single user, different Costpoint instances	Different invoices	Allowed. Both will be processed through the queue.

## Performance Enhancement for Compute Burden Costs

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Compute Burden Costs has been updated to process more efficiently and find problem pools quickly. If the system identifies any problems, the application will display the pools and their respective rate types, and then terminate the process. You can either fix the pools/rates and then re-run Compute Burden Costs, or exclude the specific pools with issues when you re-run the screen.

## Performance Optimization

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Several applications have been updated to process more efficiently and reduce their runtime during simultaneous or batch processing.

## Put Transactions On Hold for a Specific Time

This feature allows you to mark a transaction in Manage Open Billing Detail to be on hold to help you facilitate the bill generation process and eliminate manual data entry. In addition, you can put transactions on hold until a specific date, so you do not need to revisit the record to bill the transactions in the future.

### Manage Open Billing Detail (BLMOPEN)

The following have been added to this screen:

- **Hold:** Click this button to copy the **Transaction Amount**, **Transaction Hours**, and **Transaction Units** values into the **Amount on Hold**, **Hours on Hold**, and **Units on Hold** fields, respectively. You can modify the on-hold values as necessary.

If the transaction has been partially billed, the on-hold amount/hours/units will be net of the partially billed amount/hours/units.

- **Release Date:** Enter or select the date until which the amount/hours/units specified should be put on hold. This field can be blank, but you have to access and edit the record again if you no longer want to defer the on-hold amount/hours/units from billing calculations.

If the date you entered is outside of the record's period of performance, Costpoint displays an error message.

### Calculate Standard Bills (BLPGBILL)

This application considers the new **Release Date** field added to Manage Open Billing Detail. When the **Auto-Release On-Hold Items** check box is selected in Calculate Standard Bills, the system will release all transactions with a blank release date and all those with a release date prior or equal to the subperiod end date of the billing calculation. When releasing the transactions on hold, Costpoint will clear the transactions' release date.

If **Auto-Release On-Hold Items** is selected but the transaction's release date is after the subperiod end date of the billing calculation, the on-hold values as well as the release date will remain. Also, the on-hold hours, units, and amounts will not be pulled into the billing calculation at that time.

## Print Open Billing Detail Report (BLROBD)

The Open Billing Detail Report has been updated to display values for the **Release Date** field and **Hold** button added to the Manage Open Billing Detail screen.

## Subcontractor Management Working as IWO

This feature gives users the ability to set up intercompany subcontractor agreements. It allows intercompany vendor employees to change the work assignment on their timesheet/expense and update the work assignment in the requesting company. This process also updates their home company information based on the data in the work assignment, eliminating the need for double entry of timesheet or expense information.

When timesheets/expenses are approved by appropriate approvers assigned in Time & Expense, the intercompany charges are created and ready to be posted. Intercompany payment/receipt is automatic. The offset is done by manual journal entry, elimination, or other methods approved by the company.

This enhancement alleviates the need to set up inter-company work order (IWO) projects and mapping in the sending company. The responsibility will fall on the requesting company to set up the work assignments appropriately with the correct charging numbers. The sending company will have the option to update their charge numbers that are applicable for this work and select employees to charge the work assignment.

## Track Previously Reversed Bills

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Existing functionality already provides you with the capability to reverse previous bills multiple times.

In Costpoint 8.2, Reverse Previous Bills has been updated to display a warning message when you try to reverse a bill that has already been reversed. The message also includes the new invoice number that was assigned with the reversal.

This is to prevent or warn you from completing the reversal more than once, although the system will still allow you to proceed with the reversal if you want to do so.

The following applications have been updated for this enhancement:

- **Manage Standard Bills (BLMGBILL):** The new **Original Invoice Number** field on the Standard Billing Info tab displays the original invoice number when the invoice was reversed, given that the **Assign New Invoice** check box is selected in Reverse Previous Bills. This new field is available only for bills with a status of **Reverse** and hidden for all the other statuses.
- **Print Billing Worksheet (BLRBILLW):** The Billing Worksheet now includes the **Original Invoice Number** information for bills generated by the Reverse Previous Bills application.
- **Print Billing Register (BLRBREG):** If the **Print Bill Number on Report** check box is selected on this screen, a new **Original Invoice Number** column will be added to the Billing Register. If that check box is selected, the column will be labeled as **Bill # / Original Invoice Number**.

## Using Modification Effective Date in Calculating Standard Bills

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint has updated its logic in calculating standard bills by taking into account the modification effective date in the computation. This is to prevent total, cost, and fee ceilings from being released early in case future funding modifications are entered, and consequently avoid having incorrect invoices and issues with Unbilled Analysis.

Both the Calculate Standard Bills (BLPGBILL) and Calculate Retroactive Bills (BLPRBIL) applications have been modified to look at the modification effective date in computing bills. Any modifications with an effective date earlier than or equal to the subperiod ending date specified on these screens will be included in the total modification amounts.

## Materials

### Return Material Authorization Functionality

This enhancement enables users to manage customer returns and create a Return Material Authorization (RMA) for a customer return on a sales order (SO). The **Autoload** option allows users to load all SO lines from the original SO or create returns without a sales order. The payment disposition (refund, replace, or repair) for returned quantity can be specified on the return, which allows for the creation of a new sales order, negative invoice, manufacturing order, or purchase order. Users can also send email notifications to customers with the RMA number and information to send the item back to the warehouse, where it will be segregated from regular inventory until a final decision is made on how to handle the returned material.

### Create Requisition Delivery Schedule

Multiple planned orders with similar criteria are combined into a single requisition line with multiple delivery schedule rows in Firm MRP Planned Orders and Firm MPS Planned Order based on a due date window setting. The same functionality is implemented in Compute Material Requirements and when creating requisitions from sales orders.

### Costpoint Business Intelligence (BI) Enhancements

BI enhancements consist of the following sub-features:

#### Inventory Dashboard

Users can access an Inventory dashboard that aids them in analyzing data and making better business decisions on inventory value, obsolete inventory levels, negative available inventory, and count accuracy.

#### NAICS Code and Business Size

Users can print the purchase order (PO) header NAICS code and business size in the BI Purchase Order report.

#### Purchase Order Report

Users can print the Vendor UEI number, DPAS Rating, and Contract Number on the purchase order (PO) report.

#### Buyer Group Data

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This enhancement allows users to access the Buyer Groups in the BI reports and dashboards.

## NAICS Code Updates

This update allows users to see the business size at the line level change to Small if the vendor NAICS code entered on the line is indicated as Small Business, regardless of the business size for the vendor header.

In addition, it enables users to see the business size justification from the vendor or corresponding vendor NAICS code at the header level and print it on the purchase order (PO). This allows users to set this NAICS code to the preponderance of the order and see/report the corresponding business size.

## Backflush Enhancement

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This enhancement allows users to backflush lot and/or serial-controlled parts in first in, first out or first expired order. In addition, users can select an option to allow backflush of requirements on relief that were used in the manufacturing order (MO) for assemblies that were rejected.

## Addition of Address Field in Ship ID Lookup

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This update allows users to see the full **Ship To Address** fields in the **Ship ID** lookup in all screens where the Ship ID exists, and eliminate the need to navigate to customer screens to see the details. This also allows consistency with other address lookups, like **Bill To** and **Remit To**, which contain the address information. This update is also available on the Sales Order Line Shipping tab in Approve Sales Orders for visibility into the **Ship To Address** information.

## Add Recalculate Costs Functionality to Inventory Issue Screens

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

It is possible that Inventory costs could re-average while performing an issue transaction and users were previously receiving errors during these transactions when this occurred. This update now automatically recalculates costs on Issues screens (Enter Issues to Project/Account/Org or PO, Manage Sales Order Inventory Issues, and Enter Manufacturing Order Issues) when costs no longer match. There will be no indication to the user that the cost changed.

## Supplier Portal: Vendor Profile

This enhancement allows Supplier Portal Vendors to view their vendor profile, add new contacts and vendor employees, attach documents via CMI, and request additional changes through the notes via the new Manage Vendors (SPMVEND) application.

This enhancement is related to an [Accounting](#) feature.

## Supplier Portal: Preview or Print Invoices from Manage Invoices

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Supplier Portal users can preview or print an invoice or a range of invoices from the Manage Invoices screen.

## Multi-User Report Printing

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The Print Manufacturing Order Cost Report application allows multiple users to print the MO Cost Report simultaneously.

Updates to the Create MO WIP Variance Journal Entry screen allow multiple users to print/create MO WIP variance journal entry. If multiple users are running this process, Costpoint queues the transactions and processes them one at a time in the order that they were submitted.

This feature affects the following applications:

- Print Manufacturing Order Cost Report
- Create MO WIP Variance Journal Entry

This enhancement is related to several features in People, Accounting, and Projects.

## Hyperlinks to Other Transactions in Costpoint

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Users can click a record ID hyperlink to open the record in several manage and inquiry applications within the Material domain. This allows users to easily view additional details or make changes as necessary.



## Print from the Manage Screens

Users can preview or print documents/reports directly from the following Manage (Maintenance) screens, so that users do not have to access another application when they want to preview/print a document/report that they are working on.

- Manage Purchase Orders = PO or Change Order
- Manage Purchase Requisitions = Requisition
- Manage Simple Purchase Requisitions = Requisition
- Manage Request for Quote by Vendor = RFQ
- Manage PO Receipts = Receipt Trvlr
- Manage Sales Orders = SO Ack
- SO Manage Invoices = SO Invoices
- Manage Shipping Transactions = Packing Slips
- Manage Manufacturing Orders = MO Docs
- Manage Physical Counts = Physical Count Sheet
- Manage Inventory Reservations = Res Pick List
- Manage PO/Req Inventory Reservations = Res Pick List

## Print PO Updates

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This feature adds the following functionalities to Print Purchase Orders and Print Purchase Order Change Orders:

- Option to print the Period of Performance for each PO line.
- Option to exclude printing of PO lines with System Closed/Closed/Void status in the report.
- Print the PO totals and Bill to Address before standard text.
- Print a logo and return address on the purchase order and PO change order instead of having to choose one or the other.
- Option to print the subcontractor ID on the purchase order.
- Option to print the subcontractor number on the purchase order.
- Include the Effective Date of the FAR/DFAR clause when chosen to be printed on the PO from the Subcontract Record.
- Inventory Balance.

This update adds a Stock Status Summary Report under the Inventory Closing area and allows users to see the total on-hand quantity on each Inventory Transaction line in View Inventory Transaction History. The inventory quantity is stored in a database table for use in BI reports.

## View Part Inventory Defaults

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This update adds options to the Configure Inventory Settings screen that allow users to set defaults for the filter criteria on the View Part Inventory screen, including Suppress Zero Quantity Rows, Include Inventory from Other Companies, and Part/Project Selection Criteria.

## PO Import Updates: POP, CLIN, Acct Dist

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This update allows users to set the value of the following fields when importing purchase orders:

- PO Header
  - Freeze Rate check box (Exchange Rates subtask)
  - Requisition ID
  - Due Date
  - Desired Date
  - Period of Performance Start Date
  - Period of Performance End Date
- PO Line
  - Period of Performance Start Date
  - Period of Performance End Date
  - CLIN
  - Commodity Code
  - Ship via (currently defaults from Vendor)

Users can also import multiple PO Line Account records per line.

This update improves the overall performance of the system when reconciling a PO.

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This update reduces or eliminates the looping logic for the Reconcile Purchase Orders screen in order to improve performance.

## Simplify Reject to Accept Process

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

This update simplifies the Accept process of quantities when material has already been rejected in Manage Quality Inspections after a part has been rejected.

## Vouchered PO Receipt: Hard Stop Settings & Communications

Users can opt to stop other users from deleting or editing purchase order (PO) receipts or inspections when a voucher exists for a PO receipt or inspection record. In addition, users can easily contact the Accounts Payable department when users edit or delete a PO receipt that has been vouchered,

## Buyer Limit Validation on PO Line

This update allows users to insert new purchase orders lines as pending on an existing purchase order (PO) with receipts/vouchers where the approver can approve or reject the new PO line.

In addition, users will now be able to make changes to non-monetary fields on the PO without the need to revalidate against the Buyer Limits and change the PO line back to **Pending**.

## Plan, Make and Buy Unreleased Parts

This update provides new settings that allow users to use MRP to plan unreleased parts and also lets users firm those planned orders. An additional setting has been added to allow users to purchase unreleased parts by creating requisitions and purchase orders. They will be able to receive the unreleased parts but will not be able to accept them until they are released.

## Option to Force PO Change Order

This feature adds a new setting that disables certain fields on the Purchase Order if a change order has not been created. The user may choose the fields they want to disable with this setting. Pending Purchase Orders will still be allowed to be edited without a change order.

## People/Regulatory

### **Allow Managers to Add or Change Salary and Job Title Data**

Managers now have the ability to submit change requests for the information of their direct and indirect reports on the Team Details screen. Change requests can be subject for approval from HR managers. This feature includes approval workflows for employee salary and job title.

#### Configure Team Management Settings (HTMSETTINGS)

Human resources (HR) managers can now select the Team Details application from the Change Options table. Costpoint users who have access to this application can set up Team Management to:

- Require HR approval if there are changes on the Team Details screen.
- Send email notifications when there are changes/approvals to the data on the Team Details screen.

#### Team Details (HTMDETAIL)

Managers who need to make required changes for their employees can now add, change, or delete a salary record on the Salary History subtask of the Team Details screen. To use this feature, managers must be set up on the Manage users screen to have full access to the Team Details screen.

#### Manage Change Requests (HTMCHANGES)

HR Managers can now approve or reject pending change requests for the Team Details application.

#### Activate Pending Change Requests (HTPCHANGES)

HR Managers can now process any approved or pending change requests for the Team Details application in order to update the employee salary information records with the changed data.

#### Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report was updated to reflect the databases changes for this feature.

### **Allow Employees to Update Veteran Status and Preferred Name Information**

Employees can now change their veteran status, discharge date, and preferred name in Costpoint Employee Self Service. This allows employees to have more control over their employee data. You can also set up Employee Self Service to send notifications to HR administrators when employees make changes to their information.

#### Employee Personal Info (ESQEMPLPERINFO)

The Employee Personal Info screen provides employees the ability to update their veteran identification status. The following options and fields are now enabled for employees:

- Disabled Veteran

- Active Duty Warfare or Campaign Badge Veteran
- Armed Forces Service Medal Veteran
- Recently Separated Veteran
- Discharge/Release Date
- Protected Veteran (Declined to Self-Identify)
- Not a Protected Veteran
- Declined to provide veteran status
- Preferred Name

## Configure Self Service Settings (ESMESS)

A new Email Notifications subtask allows you to set up email notifications when employees make changes to their veteran identification status, discharge date, and preferred name on the Employee Personal Info screen.

## Allow Multiple Users to Access Post Timesheets

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint allows multiple users to access the Post Timesheets screen and run the process at the same time.

## Allow Multiple Users to Create Retroactive Timesheet Adjustments

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint allows multiple users to access the Create Retroactive Timesheet Adjustments screen and run the process at the same time.

## Import All Relevant Employee Fields and Generate User IDs on the Import Employee Data Screen

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

HR managers have the following capabilities on the Import Employee Data screen:

- Import **Last Day Worked** field and all relevant employee fields that were not previously included in the import process. HR managers no longer have to edit the imported records manually in Costpoint to add the missing information.
- Create Costpoint user IDs for new employees as part of the Import Employee Data process. HR managers no longer have to add the user IDs manually for imported new employee records.

## New Layout of Pay Periods, Leave Periods, and Timesheet Screens

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint 8.2 provides new layouts for the following essential screens for improved usability:

- Manage Timesheet Periods
- Manage Leave Periods
- Manage Pay Periods

## Update Gender, Race, Benefits Gender, Military statuses, Military Discharge Date, and Race in the ESS Life Events

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Currently, Costpoint already allows Employee Personal Info screen users to edit the **Preferred Name**, **Military Status** and **Military Discharge Date** fields. In Costpoint 8.2, the same users will be allowed to edit the **Suffix**, **Race**, and **Gender**, as well as edit their information through an ESS life event.

## Time & Expense

### Calculate Automatic Overtime Enhancements

Automatic overtime calculation, which was implemented in version 8.1, was updated with additional changes and enhancements.

#### Timesheet Classes

The Timesheet Classes application (**Time » Time Controls**) was updated as follows:

- The Overtime Options section was moved to the Overtime Hours Rules tab, and a new **Calculate on Save** option was added. The new option is selected by default but can be cleared if **Overtime Handling** is selected as Calculate.
- When automatic overtime calculation is implemented, you can now also configure:
  - Overtime rules for Saturdays and Sundays even if 7<sup>th</sup> Consecutive Day is enabled.
  - Weekly and daily overtime hours limits per timesheet class.

#### Timesheet

The Timesheet screen (**Time » Timesheets**) was updated as follows:

- The Pay Type subtask displays a summary of hours automatically calculated as overtime by pay type.
- Automatic calculation and distribution of overtime occurs when the timesheet is saved.
- Automatic overtime calculation allows all daily rules, such as weekend and 7<sup>th</sup> Day Consecutive rules, to exist together using a hierarchy for the calculation.

#### Export Timesheets

Export Timesheets (**Time » Timesheet Interfaces**) was updated so that calculated overtime is available for export after timesheets are approved.

### Intracompany Work Assignment Enhancements

This enhancement is related to the cross-domain “Intracompany Work Assignments” feature described in the Materials section of this document.

When a multi-company system is configured to support intracompany subcontractor agreements, related account details, such as intracompany work assignments, are available to users of Time & Expense.

#### Changes to Timesheets and Expense Reports

Key features for subcontractors entering hours or expenses, as well as supervisors approving time or expense information, include:

- Intracompany Work Assignment (ICWA) charge codes will populate a new **Work Assignment** field and associated Lookup on timesheets and expense reports for subcontractor resources. After a code is added, other information, such as the PO ID and PO Release Number, populate the timesheet or expense report.

- ICWA codes added to a timesheet or expense report can be saved as a favorite on the new Work Assignments Favorites subtask.
- The default report available for printing from the time entry and expense entry applications includes a new Work Authorization page that displays any ICWA lines that were added to the timesheet or expense report.

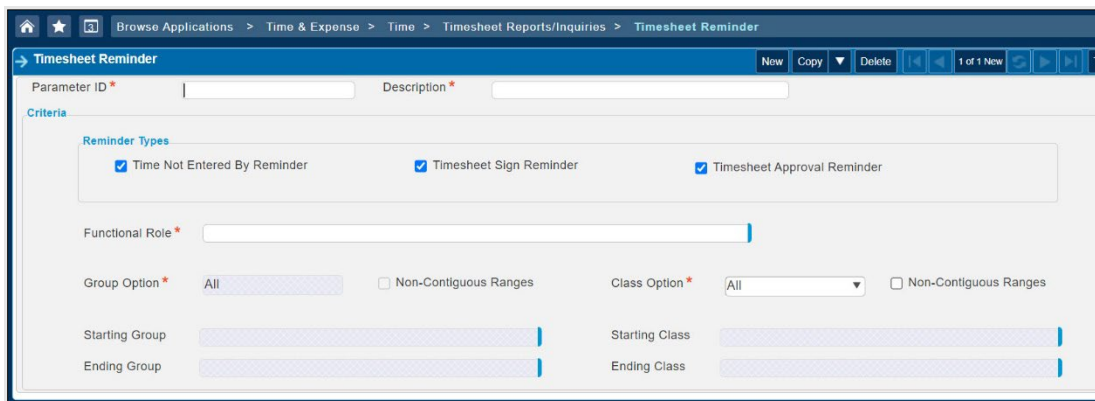
## Related Changes to Other Applications

ICWA charges are available for selecting and viewing in the following applications:

- Time » Timesheets » Manage/Approve Timesheets
- Time » Timesheet Interfaces » Export Timesheets
- Time » Time Utilities » Change Timesheet Status
- Expense » Expense Reports » Manage/Approve Expense Reports
- Expense » Expense Utilities » Change Expense Report/Advance Status
- Expense » Expense Interfaces » Compute Commitments

## New Timesheet Reminder Application

A new Timesheet Reminder application (**Time » Timesheet Reports/Inquiries**) was added that enables administrators to create automated emails to remind employees to complete and sign their timesheets and for supervisors to approve them.



Using the Timesheet Reminder screen, supervisors can generate and schedule email reminders for the following timesheet-related tasks:

- Entering hours
- Completing and signing timesheets
- Approving timesheets

Delivery can be scheduled in advance for designated days and times, and the application can check for timesheets in the current period that were not signed by the date and time specified. You can direct email reminders toward groups and classes by functional role or to all groups and classes.

Types of reminders include:

- **Time Not Entered By Reminder:** Select this check box to run a check for any timesheets for the current period or current day that has yet to have hours saved.



- **Timesheet Sign Reminder:** Select this check box to run a check for any timesheets for the current period that have yet to be signed.
- **Timesheet Approval Reminder:** Select this check box to run a check for any timesheets for the current period that have yet to be approved.

In addition, a **Timesheet Reminders** option was added to the **Email Source** drop-down list in **Configuration » General Controls » E-mail Text**. The subject line and body text of the email notification is customizable.

## Break Rule Enhancement

A new Break Check application (**Time » Timesheet Reports/Inquiries**) was added that enables administrators to ensure that employees record required breaks.

Similar to existing inquiries, such as Daily Floor Check, the Break Check inquiry can be run manually as needed and also scheduled to run automatically.

Updates related to break rules in other applications include the following:

- An optional Maximum Hours Before Break Warning field was added to the Regular Hours Rules tab of Time » Time Controls » Timesheet Classes.
- The **E-mail Source** drop-down list in **Configuration » General Controls » E-mail Text** includes a new **Break Check** option for managing break notifications.
- The Time In/Out subtask of the Timesheet application includes the following new elements:
  - A non-editable **Timesheet Day** label displaying the timesheet date
  - A non-editable field displaying the day of week for the timesheet date

**Note:** This summary description will be supplemented with additional content in the near future.

## Notes Column Added to Charge Favorites

The **Notes** column was added to the Charge Favorites subtask table on the Timesheet screen. Users can enter notes into this field to help them track multiple charges that they use on various projects. The field allows up to 4,000 characters.

Charge Favorites												Delete	Form	Query
<input checked="" type="checkbox"/>	Load	Work Pct *	Holiday	Vacation	Charge Description	Account	Project	PLC	PLC Company	Organization	Pay Type	Notes		
<input type="checkbox"/>		0%	<input type="checkbox"/>	<input type="checkbox"/>	FLOOR INSTALLATION		9800.004.10							
<input checked="" type="checkbox"/>		0%	<input type="checkbox"/>	<input type="checkbox"/>	Jackson Bronx		AJ00.001							

## Status Column Added to Resource Groups Employees Subtask

To enable administrators to filter out inactive employees when providing supervisors lists of employees who report to them, a **Status** column was added to the Employees subtask on the Resource Groups screen (**Configuration » Resources**).

## New Expense with Images Report

An Expense with Images Report application (**Expense » Expense Reports/Inquiries**) was added that enables you to create billing backup reports for claimed expenses. The report displays transaction details, charge details, and receipt images that you can include when billing customers.

The report output displays with transaction details on the left side of the page, such as transaction dates, charge details, merchant information, location, meal attendees, and ceiling amounts. On the right side, images of relevant receipts and invoices display. For example:


Printed 07/06/2021 Any immediate disclosure needed could be added here if info is higher up in hierarchy Page 1 of 7

**Report ER00000174 | Parameter, Megan R. (1001)**


DATE	STATUS	DESCRIPTION	REVISION	CORRECTION	TOTAL TO ME	CURRENCY	PAYMENT RECEIVED
03/22/2019	Draft	Customer Visits	0	0	796.97	USD	0.00

EXPENSE ID 1	Parking/03/20/2019	
Attachment	1 of 1	
Expense Type	Parking	
Expense Date	03/20/2019	
Payment Method	Employee Paid	
Amount	2.00	
Transaction Currency	USD	
.....		
Charge		
20216.02.02	Description goes here	2.00

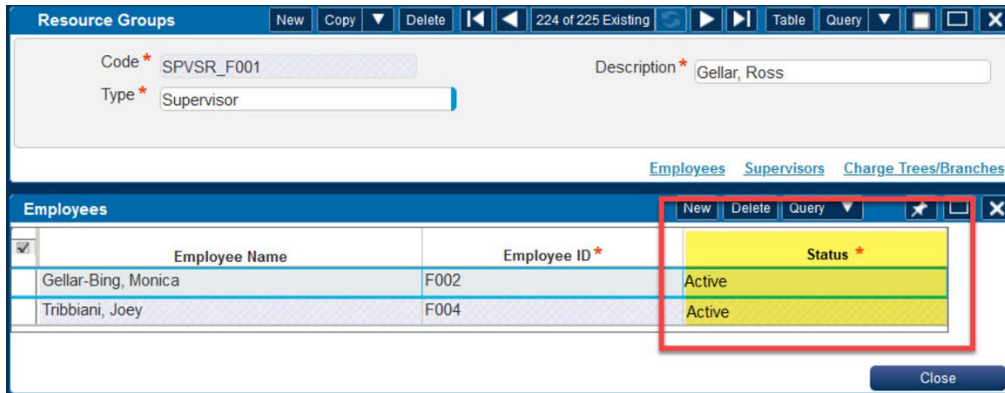
EXPENSE ID 2	Parking/03/21/2019	
Attachment	1 of 1	
Expense Type	Parking	
Expense Date	03/21/2019	
Payment Method	Employee Paid	
Amount	29.00	
Transaction Currency	USD	
.....		
Charge		
20216.02.02	Description goes here	29.00



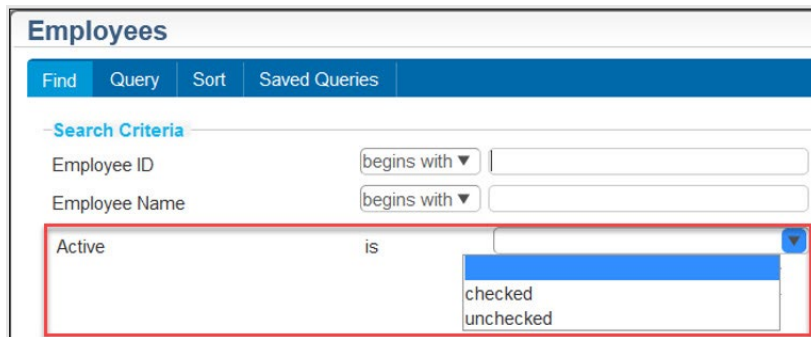
Accepted image formats include:

- .jpg
- .jpeg
- .pdf
- .png
- .gif
- .tiff

**Note:** This summary description will be supplemented with additional content in the near future.



In addition, an **Active** status filter was added to the query function on the Employees subtask.



The **Active** field drop-down list includes two options:

- **Checked:** Select this option to filter your query results only for employees with a status of Active.
- **Unchecked:** Select this option to query for both Active and Inactive employees. You can also leave the field blank. A blank field is the default selection.

## Rebuild Leave Taken Utility Updated

The Rebuild Leave Taken utility (**Time » Time Utilities**) was updated to enable supervisors and administrators to run the rebuild leave function for a single employee or selected employees within a timesheet class. For example, it can be used when an individual employee changes timesheet class.

The utility also creates an output report containing updated leave balances.

**Note:** This summary description will be supplemented with additional content in the near future.

## Mobile Time and Expense-Related Updates

The following topics include enhancements to the Costpoint Mobile Time and Expense application.

**Note:** The official name of the application is *Costpoint Mobile Time and Expense*. This document uses it only at the first mention. Succeeding instances of the application name display *Costpoint Mobile T&E*.

In addition, the application name in the *Apple App Store* and *Google Play Store* displays *Costpoint Time and Expense*.

**Note:** The version number appended to each feature title is explained as follows:

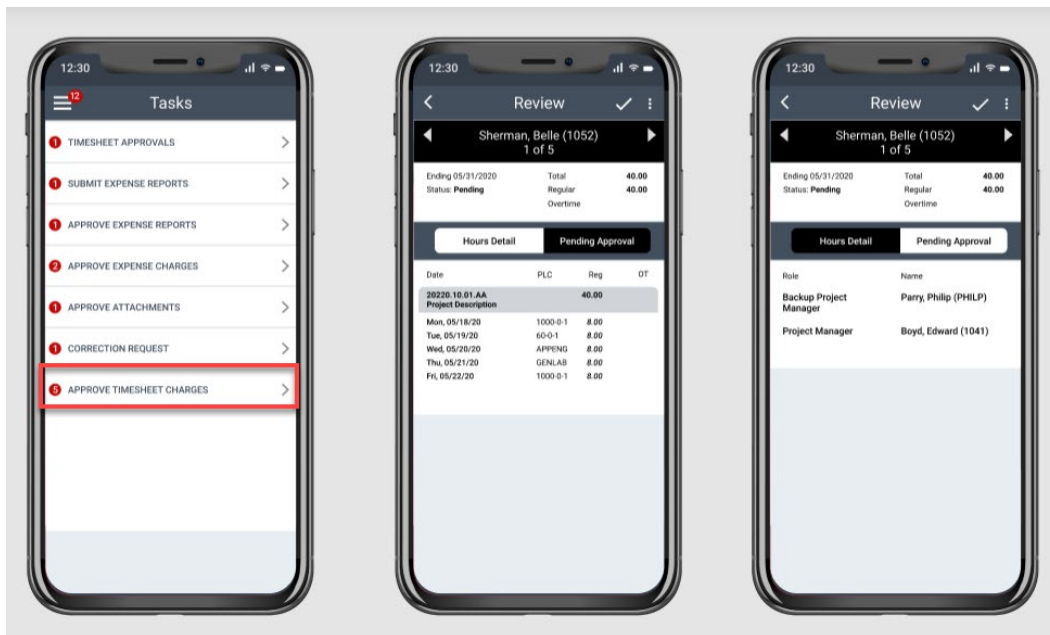
- **7.1+:** The feature is available to users of Costpoint 7.1.x, 8.0.x, 8.1.x, and 8.2.x.
- **8.0+:** The feature is available to users of Costpoint 8.0.x, 8.1.x, and 8.2.x.
- **8.2+:** The feature is available to users of Costpoint 8.2 and higher.

### Support for Timesheet Line-Level Approval (8.2+)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Beginning with Costpoint Mobile T&E version 2.3, resource managers can review, approve, and reject lines on resource timesheets through the mobile application instead of a browser-based Timesheet screen.

A new task called **Approve Timesheet Charges** is added to the Tasks screen. Tapping this task displays the Approve Timesheet Charges screen, which is created for resource managers that do not have rights to the resource's timesheet, but do have rights to approve timesheet charges.



Sample Approve Timesheet Charges Screen

## Improved Favorites Functionality (7.1+)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The following enhancements are added to the Costpoint Mobile T&E application to further improve the Favorites functionality.

### % (Work Percentage) Field

If your timesheet is generated to use the Generate Exception-Based Timesheets feature, % for work percentage displays next to the timesheet charge. You can enter a work percentage for each favorite, and the percentages for all favorites must total 100%.

This field displays only if you are using Costpoint 8.2 and higher and the **Generate Exception-Based Timesheets** option in **Time & Expense » Time » Time Controls » Timesheet Classes** in Costpoint is selected.

In addition, comments are copied into the new timesheet line if created from the favorite charge.

### Support for ICWA Charge

Intra Company Work Assignment (ICWA), a new charge type added to Costpoint 8.2, is also supported in the Costpoint Mobile T&E application beginning with version 2.3.

## Remove Email URL Population (7.1+)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

To comply with the new mobile application security requirements, the feature to populate the Costpoint Mobile T&E Server URL via email when logging on to the application for the first time is no longer supported beginning with Costpoint Mobile T&E version 2.3.

## Turn off Landscape Mode When Accessing the Application on Mobile Phones (7.1+)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

In order to have a better user experience when you access the Costpoint Mobile T&E application on a mobile phone running on iOS or Android, the Landscape mode is turned off, and your mobile phone screen is locked to Portrait mode. However, if you access the application on a tablet computer, you can switch your screen orientation.

## Allow Backup Resource Managers to Perform Approvals Using the Mobile Application (8.0+)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

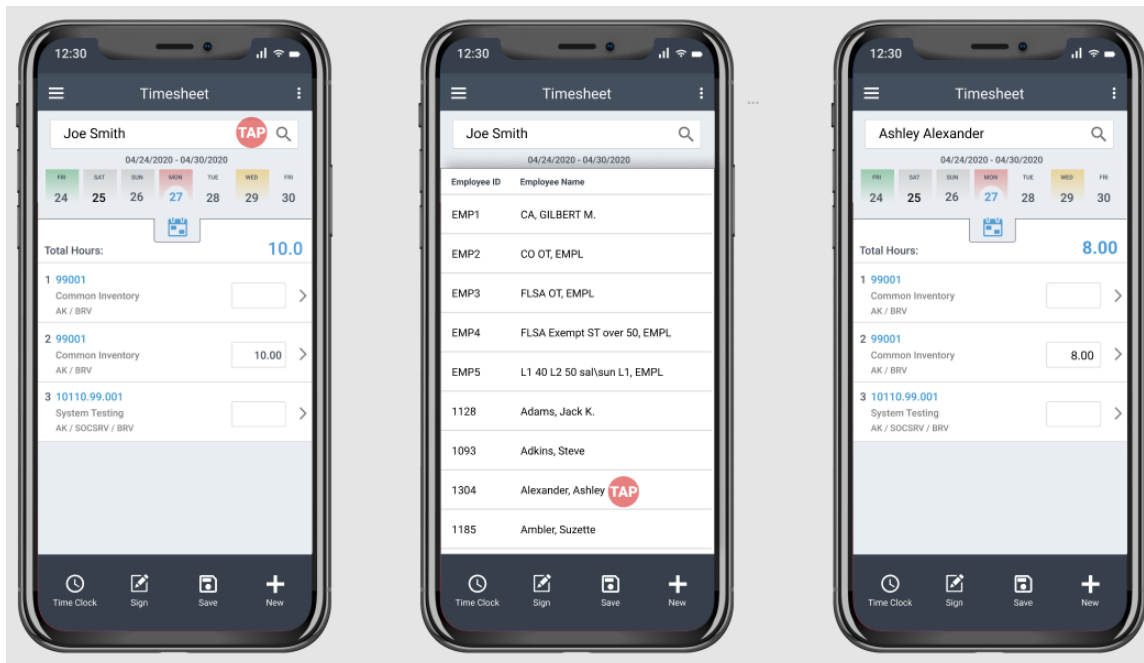
Beginning with Costpoint Mobile T&E version 2.3, backup resource managers can access timesheets and expense reports not assigned to them using the mobile application instead of Costpoint (web), and approve or reject them accordingly.

## Support for Proxy Functionality (8.2+)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

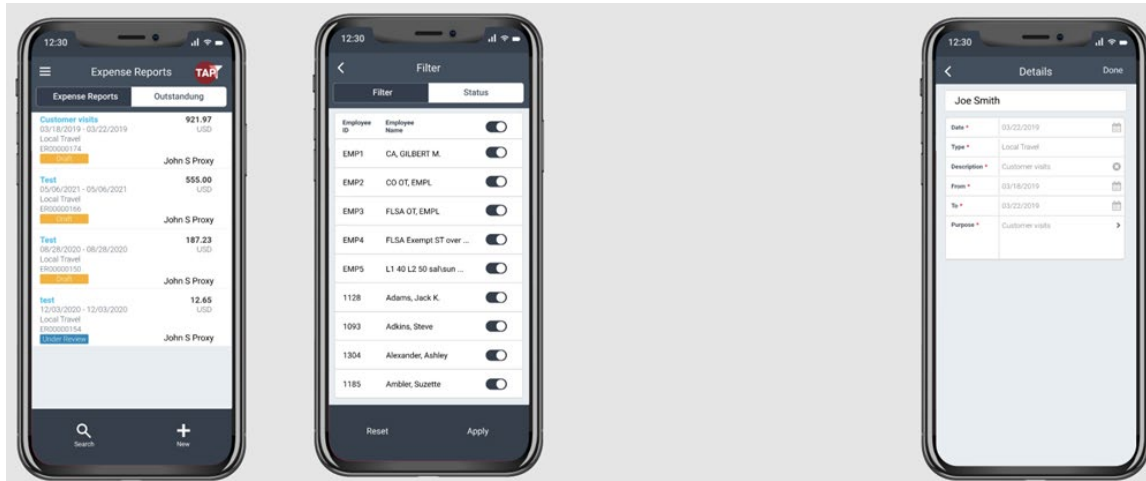
Beginning with Costpoint Mobile T&E version 2.3, proxy permission is available for users of Costpoint 8.2 and higher, allowing resource managers or other resources to perform time and/or expense entry for other resources.

A search functionality is added to the Timesheet and Expense Reports screens. You can search from a list of resources to which you have proxy permission, tap the resource name, and perform time and/or expense entry.



*Proposed Changes to the Timesheet Screen*

Time & Expense



*Proposed Changes to the Expense Reports Screen*

## Security Updates (8.0+)

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Security-related updates are included in this release.

## Reports & Analytics

### Costpoint Business Intelligence

#### Project Role Security Support in Costpoint BI

When the **Project Roles Security** field is set to **Yes** on the Manage BI Settings screen, only users who have an assigned role to a project have access to its data along with the corresponding limits of that particular role. The assigned roles for these users should also be configured on the Manage Functional Roles screen where the **BI** check box is selected.

Project Role security expands secured access to other roles beyond the existing Project Manager (PM) security. If you have PM security applied on the following packages, Project Role security is a better option.

- Accounts Receivable
- Project Reporting
- Smart AI

This enhancement affects project reports that come out of the box.

A new user group, CER\_ROLE\_SEC - CER Role Security Group, is now available to support Project Role Security. Users assigned to this group will see only projects where they have been assigned a role.

To easily transition users from the CER\_PM\_MGR user group to the new CER\_ROLE\_SEC, the User Group Rights Report has been updated to match the user setup on the Manage User Groups screen.

#### Organization Security for CRM & Contracts

The CRM & Contracts model now supports Organization Security.

If Organization Security has been configured on the Manage BI Settings screen, users of the CRM & Contracts model will see only opportunity and contract management records of the organizations to which they have been assigned.

If module security is enabled, Costpoint BI will apply the contracts and opportunities profile in validating the data to show to users. Costpoint BI also checks for the organization that has been assigned to the user. If an organization has not been assigned, the records for the owning organization will be displayed.

#### Overall Improvements in Costpoint BI

Several changes were made to improve the usability experience in Costpoint BI.

- Page numbering has been improved in reports where the cover page and history were excluded in the page count.
- The reports, packages, and user groups now have descriptions.
- You may have been granted access rights to some reports that are within inaccessible folders or areas of Costpoint BI due to your role. With the improved object security, system administrators can now set up shortcuts to access those reports regardless of the folder location. Key fields in the secured packages are now visible.
- Some reports now use the secured packages for better performance. You will see the list of modified reports as listed in the succeeding sections in their specific Costpoint BI area. While the



original legacy reports are still available, Deltek recommends to use and migrate to the newer versions that utilize the secured packages.

## New Packages and Content in Costpoint BI

New Costpoint BI packages, dashboards, and reports for this release are summarized in this section.

### New Human Resources Package

A new Human Resources (HR) package that includes key tables from the Costpoint People domain is now available.

The HR package supports model security, which is set up in Costpoint BI, where data- or row-level restrictions apply based on Costpoint settings. This package is also compatible with newer BI functionality, like dashboards.

The following reports use this new HR package:

- VETS 4212 Report
- EE01 Report
- Employee Benefits Profile
- Benefit Enrollment Report

### New Payroll Package

The Payroll package includes key tables that support payroll reporting needs.

When model security is enabled on Costpoint BI, data- or row-level restrictions based on Costpoint settings apply. As with most recently introduced Costpoint BI packages, this supports BI functionality, such as dashboards.

The Earnings Report uses this new Payroll package.

### New Billing Package

The new Billing package uses Dynamic Query Mode (DQM), which has several technical benefits that are required to leverage some of the newer BI features. such as dashboards and data modules.

To find out more about DQM, see the [IBM website](#).

If model security is enabled in Costpoint BI, this package supports Project Role and Object security based on your Costpoint user settings.

### Repointed Reports in Costpoint BI Billing

Some reports were repointed to the Billing package of Costpoint BI.

The following reports now use the Billing package:

- Aged Open Billing Detail
- Milestone Invoice
- Pre-Bill Report
- Standard Invoice Backup
- Zero Rate Billing Exception Report

### New Fixed Assets Package

The new Fixed Assets Package uses Dynamic Query Mode (DQM) as well which makes it compatible with the BI features that lets you create dashboards and data modules.

The Fixed Assets Report uses this new Fixed Assets package. On this report, you will see the total cost, accumulated depreciation, book value data, as well as the percentage of the asset that has already been depreciated.

### Inventory Dashboard

The Inventory Dashboard is now available. This dashboard has components such as Inventory Turnover, On Hand Vs Reserved Inventory, Count Accuracy, and Location Count Status.

### New User Groups

Costpoint Business Intelligence 8.2 is now available to support Project Role Security and the addition of several user groups.

The new user groups are:

- **CER Role Security Group - CER\_ROLE\_SEC**: Individuals assigned to this user group will only see data of projects where they have an assigned role.
- **CER Managed Content Authors - CER\_MC\_AUTHORS**: This is an object security group, and users assigned to this group can create managed content in the company content area.
- **CER Human Resources - CER\_HR\_SECURE**: This is an object security group used to grant permissions to the secured HR content.
- **CER Payroll Secure - CER\_PR\_SECURE**: This is an object security group used to grant permissions to the secured Payroll content.
- **CER Fixed Assets DQM - CER\_FA\_SECURE**: This is an object security group used to grant permissions to the new Fixed Assets content.
- **CER Billing Secure - CER\_BILL\_SECURE**: This is an object security group used to grant permissions to the secured Billing content.
- **CER All Secure (DQM) Only - CER\_SECURE\_ALL**: This is an object security group used to grant permissions to the secured or DQM packages only. This eliminates legacy content.
- **CER Incurred Cost Submissions - CER\_ICS\_SECURE**: This is an object security group used to grant permissions to the new ICS content.
- **CER Core Secure (DQM) Only - CER\_CORE\_SECURE**: This is an object security group used to grant permissions to secured or DQM content that belongs to Costpoint core. This eliminates access to legacy content or modules that required a separate license.

## Updates to Costpoint BI Packages and Content

Several changes to Costpoint BI packages and content are included in this release.

### Enhancements in Costpoint BI Accounts Payable

Several changes were made to Costpoint BI Accounts Payable.

### Repointed Reports in Accounts Payable

Several reports were modified to use the Accounts Payable package.

- Vendor Master
- Vendor Employee

### Enhancements to Costpoint BI Accounts Receivable

Several changes were made to Costpoint BI in relation to Accounts Receivable.

#### Check Number in the Accounts Receivable Model

The Accounts Receivable (AR) model supports the increased field length of the **Check No.** field.

The **Check No.** field has been changed from a 10-digit integer to a 25-digit varchar field.

#### Cash Receipts Table

The Cash Receipts table has been updated with the inclusion of a new **Notes** field.

The **Check No.** field has also been changed from a 10-digit integer to a 25-digit varchar field. The following columns were updated:

- CASH\_RECPT\_TRN
- AR\_DETL\_HS
- CASH\_RECPT\_TRN\_HS

#### Repointed Report in Accounts Receivable

The Customer Master Information report now uses the Accounts Receivable package.

### Enhancements in Costpoint BI General Ledger

Several changes were made to Costpoint BI in relation to General Ledger.

#### General Ledger Detail Report

The General Ledger Detail Report was enhanced with the changes to the prompt page and the addition of several columns on the report.

The new columns are:

- Project Name
- ID Type
- Check No
- Posting Sequence No
- Time Stamp
- Cash Receipt No
- Cash Receipt Date

You also have the option to display the Amount, Transaction Amount, or both on the report. If the Transaction Amount is included, the Transaction Currency is included as well. The report can now also be printed in landscape format. To support this enhancement, changes to the General Ledger model were made.

### Repointed Reports in General Ledger

The following reports were modified to use the General Ledger package.

- Balance Sheet
- Income Statement
- Account List
- Cash Flow Report
- Organization List
- Reorganization Structure

### Enhancements in Costpoint BI Planning

Several changes were made to the Planning area of Costpoint BI.

- **Enhanced Revenue Forecast Report:** The new Revenue Forecast report now displays 12 months of forecast data.
- **Enhanced Project Labor Hours Status Report:** The Project Labor Hours Status report now includes an ITD Burn Rate column which is computed as the actual number of hours worked divided by the number of periods. This information is displayed per resource.
- **New Description Columns for Reporting Tables:** A description column was added to the non-labor budget entry rows of the reporting tables used in Planning. This will help report users identify for what a particular budget entry was used.
- **Planning Model:** When you use Planning models on your reports or dashboards and apply labor suppression, summary values of labor amount values will display.

### Enhancements in Costpoint BI Materials

Several changes were made to Costpoint BI in relation to Costpoint Materials.

- In order to support the Customer Return Material Authorization feature, new data fields are included in the Materials Model.
- The Buyer Name filters are now available on the Procurement Dashboards in order to filter the purchase orders and requisitions by buyer.

### Enhancements in Costpoint BI CRM & Contracts

Several changes were made to Costpoint BI in relation to CRM & Contracts.

- Opportunity Dashboard
  - **Leads by Source and Opportunities by Source dashparts:** These are now available on the Opportunity Dashboard. These dashparts display where the best leads and opportunities are generated.
  - **Opportunity by Agency/Customer:** This information displays the opportunity value by agency to identify where to focus most of the efforts.
  - **Opportunity by Role:** This information displays the opportunity value for a specific role to see who is bringing in the highest values.
- New fields on the Contract Management Model
- New fields on the lead contact record

- **Address:** This enables you to create queries for leads for a particular city or state.
- **Do Not Contact/Email flag:** This flag helps you to identify leads who do not wish to be contacted further.
- **Insert button:** This button automatically adds contact information from the Leads header to the Business Affiliations subtask for an existing vendor or customer.
- UDEFs in Contracts

### Enhancements in Costpoint BI Employee

The Employee Basic Information report is now available in the Employee folder of Costpoint BI.

The report now uses the secured Employee package.

### Enhancements to Costpoint BI Projects

Several changes were made to the Costpoint BI in relation to Projects.

#### Project Revenue Summary Report

A new version of the Project Revenue Summary Report is now available.

The report uses the Projects package, which supports row level security. New columns are included in the Projects package, such as Period Prior Year Revenue Recognized, with the option to display Target rates, Actual rates, or both.

#### Project Status Report in Costpoint BI

You can now select an alternate project when you generate the Project Status Report (PSR) in Costpoint BI.

In addition, the header of this report was modified to include the contract and funded values (without future mods). The PSR, including its drill-through links, also use the secure Projects Master package.

#### Enable Project Role Security Flag in Manage BI Settings

A check box is now available in Manage BI Settings to enable the application of Project Role Security in Costpoint BI.

#### Repointed Reports in the Projects Package

The following reports were modified to use the secure Projects package for better performance.

- Project Master
- PLC Exception Report

### Report Repoints

With the enhancement of using Dynamic Query Mode (DQM) on several packages, some of the existing reports were repointed and now use these new packages.

Package	Report
Human Resources	VETS 4212 Report
	EE01 Report

Package	Report
	Employee Benefits Profile
	Benefit Enrollment Report
Payroll	Earnings Report
Billing	Aged Open Billing Detail
	Milestone Invoice
	Pre-Bill Report
	Standard Invoice Backup
	Zero Rate Billing Exception Report
Fixed Assets	Fixed Assets Report
Accounts Payable	Vendor Master
	Vendor Employee
Accounts Receivable	Customer Master Information
General Ledger	Balance Sheet
	Income Statement
	Account List
	Cash Flow Report
	Organization List
	Reorganization Structure
Employee	Employee Basic Information
Projects	Project Revenue Summary
	Project Master
	PLC Exception Report

## Admin

### Certification Authentication for Web Services

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The new Web Services tab in Manage Users (SYMUSR) offers an alternative authentication model to use for web services. On the Web Services tab, set up JWT authentication for users as an additional layer of security. Select the **Authenticate with JWT** check box and add the JWT certificate for authentication.

Also, the **Allow Application Access via Integration Services** check box from the Authentication tab was moved to the Web Services tab and renamed to the **Allow Application Access via Web Services** check box.

### Enhanced Authentication for SharePoint Online

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint has a new authentication method for SharePoint Online (O365). You can authenticate Costpoint to SharePoint Online with application (app-only) authentication in Azure Active Directory.

In the Costpoint Configuration Utility, this feature is supported with the new Security Mode option, **Federated (OAUTH2)**. This option is available when the API Type is **SharePoint Web Services**. More information is available in the Deltek Costpoint 8.2 Configuration Utility Technical Guide.

### Navigation Changes

The user interface is updated to support easier navigation.

#### Menu Navigation

New menu navigation improves the way users move throughout Costpoint by providing an intuitive experience that enhances existing functionality.

#### Improved Handling of Multi-Domain Applications in Application Menu

When an application shares multiple modules across different domains, such as how AP, PO, and PP modules share the APMVEND application, the Browse Applications menu shows the application only in the domain where the user has module rights. Previously, you could see multiple domains for the same application in the Browse Applications menu.

#### Info Card for Fields

Quickly view a non-editable Info Card that contains additional details about the value in a field. This feature helps you understand what you are viewing without having to leave the current screen.

For non-editable fields, click the “i” icon in the data field to open the info card. When typing ahead in an editable field, the Info Card icon displays next to the values in the drop-down list. Click the icon to view the Info Card and click **Select** in the Info Card to add the value to the field.

This feature is available in Form View and Table View.

## Add New Values in Lookup Fields

You can create new records faster without navigating to another area of Costpoint. At the bottom of the Lookup window, you can click the **Add New** option to launch a screen to create a new record. For example, if a user is in Manage AP Vouchers and enters a Vendor and/or selects the Lookup icon and realizes the vendor does not exist, the user can create the vendor. After the new record is created, it is automatically added to the field in the original record.

## Manage Application/Content Type Links (SYMCMIAL) Application Updates

To support the new Accounting feature, Intelligent Character Recognition (ICR) is added to allow users to scan invoices and automatically populate the Accounts Payable vouchers with the invoice details. This feature minimizes the need for manual data entry of the invoice into Costpoint. This feature will utilize Content Management Integration (CMI) as part of the import/scan process.

To support ICR capability, enhancements were made to the CMI process. The Manage Application/Content Links screen is updated with a new **Show Scan action button** check box. Select this check box for an application/result set to display the **Attach & Scan** option in the new Attach dialog box and the **Scan** option in the Linked Content Files subtask when a user attaches a file to a record. This check box will only be available for applications set up for ICR.

A new dialog box has been added to improve the CMI process and reduce the number of steps it takes to attach a document to a Costpoint record. All screens that have CMI applied will now have two options available from the **Attach** button. **Attach** will display a new Choose File dialog box and a **View Linked Content Files** option. The **Linked Content Files** option will open the existing subtasks, and users can process their documents using existing processes.

The new Choose File dialog box eliminates the need to use the **Process » File Upload** application and consolidates attaching a file into one screen, reducing the number of steps it takes to attach a document to a record.

## Assign a Default Content Type

On the Manage Application/Content Links screen, select the **Default Content Type** check box to set the selected content type as default for that specific application/result set. You can assign one default content type per result set. This new functionality is not limited to users who need ICR functionality.

## Default Source

To reduce repetitive selections when linking content files, you can set the default source location for content files for an application/result set in the Default Source section. Select **Local File** when most files for the application/result set need to be uploaded to the source storage location. Select **Alternate File Location** when most files are already uploaded to the source storage location. This new functionality is not limited to users who need ICR functionality.



## New Behavior for Content Link Setting

On the Manage Application/Content Links screen, when the **Allow New Content Links in this Application/Result Set** check box is not selected, you will not see the content type in the **Attach** feature or in the **Content Type** list on the Linked Content Files subtask.

## Query Feature in Applications with Tabbed Subtasks

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The Query button is available at the parent level of the result set when you open subtasks that are displayed as tabs in applications in the CRM & Contracts domain. This enhancement allows you to query results for fields within these subtasks across all records. The following applications have been updated:

- Manage Contracts
- Manage Opportunities
- Manage Subcontracts
- Manage Contract Management Vendor Info
- Manage Contract Management Customer Info

## Auto-Positioning Setting On by Default

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Auto positioning, which currently exists in Costpoint, automatically increases the font on large monitors if there is enough space. It also lays the elements on the screen using the best use of space, creating a better user experience. To increase awareness of this feature, the Auto Positioning On setting is on by default. You can turn the setting off. Companies can set the defaults at the company level on the Configure Systems Settings screen or for specific users in Manager Users. Users can modify their default preference in Manage User Preferences.

## Support of Latest WebLogic Version

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint 8.2 supports the latest version of WebLogic and Java 11.

## SQL Partitioning

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Costpoint supports SQL partitioning for SqlServer to improve performance. This feature is optional and requires the deployment of extra scripts to partition the tables.

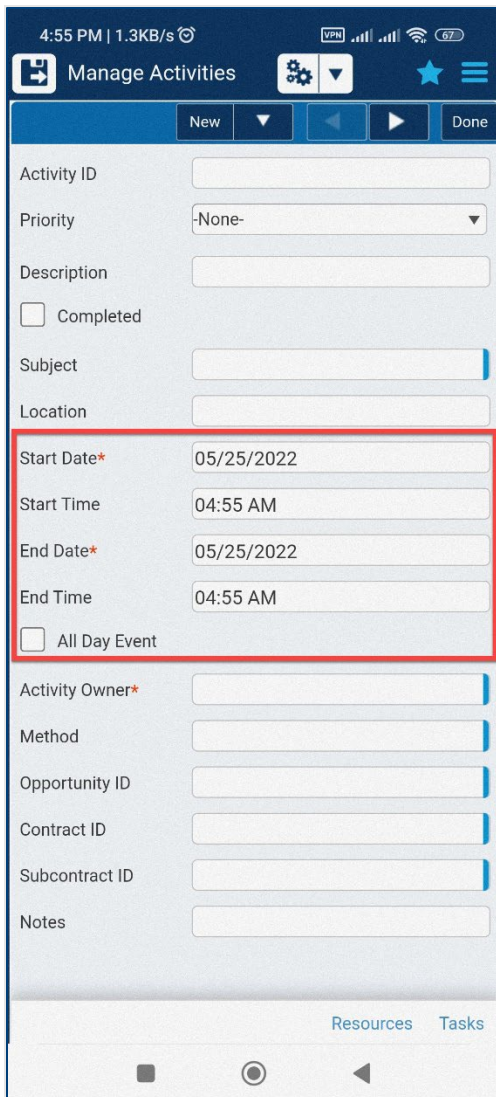
# Costpoint Mobile/PWA

## Activities Enhancements: Mobile Updates

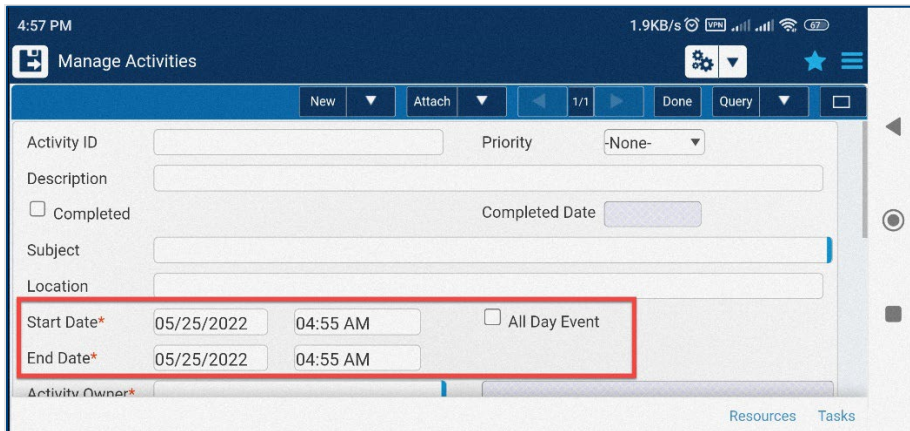
**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

Updates made to the Manage Activities screen in the native Costpoint application are also implemented in Costpoint Mobile. The same functionalities work, but there are slight differences in the layout and labels to make it easier for you to enter date and time values.

In portrait mode, the new fields are labeled as **Start Date**, **Start Time**, **End Date**, and **End Time**.



In landscape mode, the new fields are labeled as **Start Date** and **End Date**.



## Install Costpoint PWA Tooltip

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

When you open the Costpoint Login page on an iOS device, a new tooltip displays instructions to install the Costpoint PWA.

## Installation Instructions

There are no new installation instruction changes currently planned for Costpoint 8.2.

## De-supported Applications

**Note:** This feature is not included in the 8.2 Early Adopters (EA) program. It is a planned feature for version 8.2, and barring changes, it will be included in the 8.2 General Availability (GA) release. In addition, the feature description may also be revised or updated for GA.

The following application has been de-supported in Costpoint 8.2.

Domain	Module	Application ID	Application Name
CRM & Contracts	Opportunities » Opportunities	CTMOPPM	Opportunities Quick View

## Appendix: For Additional Information

### Deltek Support Center

The Deltek Support Center is a support website 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 website.

### Access Deltek Support Center

**To access the Deltek Support Center:**

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

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

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## About Deltek

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