Deltek

Deltek Costpoint® Enterprise GovCon Cloud

December 2023 Release Notes

(Costpoint MR Version 8.1.26)

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Contents

Overview

This document is a compilation of Costpoint, Costpoint Planning, and Time & Expense enhancements and software defect resolutions from November 2023 (CP Maintenance Releases 8.1.26) and includes any regulatory enhancements.

These will be applied to the Cloud environment mid-December. See announcements on your portal page for details.

Note that the version numbers above (for example, 8.1.26) refer to the Costpoint Maintenance Release (MR) upon which this document is based are for reference only.

If you have feedback or questions, please send an email to DeltekDocumentationFeedback@deltek.com

Database Changes

Database Change documents detail data dictionary changes from one release to the next. To see the Database Change document for this MR, refer to 8.1.x Data Dictionary Updates.

Costpoint Business Intelligence 8.1.18+ and Cognos Analytics with Watson

Costpoint BI 8.1.18+ is compatible with Cognos Analytics with Watson 11.2.4 only. If you are leveraging Cognos Analytics 11.1.7, the highest version of Costpoint BI MR that you can apply is Costpoint BI 8.1.17. Note that you can continue to apply the Costpoint MRs beyond 8.1.17, regardless of which Cognos version you are deploying. Costpoint and Costpoint BI MRs are independent of each other.

Regulatory Enhancements

This section includes summaries of the regulatory enhancements made to existing features in this release.

Federal

2024 401(k) Limits

The following are the 401(k) limits for 2024:

- 401(k) Deferral Limit: $23,000.00
- 401(K) Wage Limit: $345,000.00

To support the federal update, this release adds records to the Manage Federal Taxes screen.

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

2024 Social Security Wage Base

The Old-Age, Survivors, and Disability Insurance taxable wage base increases from $160,200 to **$168,600** in 2024.

To support the federal update, this release adds records to the Manage Federal Taxes screen.

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Employer and Employee Information from Generated or Manually Entered W-2s Are Now Stored by Costpoint

When you generate W-2s/W-2Cs from the Create W-2 Table screen or enter the W-2s/W-2Cs on the Manage W-2s and Manage W-2Cs screens, Costpoint now stores the following information:

- Employer Tax ID
- Employer Address
- Employer Name
- Employee SSN
- Employee Name
- Employee Address

This enhancement will allow Payroll managers to reprint the employee and taxable entity information for a W-2/W-2C that displays all the W-2 data as it was at the time of the original printing and not use current data for Employer Tax ID, Employer Address, Employer Name, Employee SSN, Employee Name, and Employee Address.

Create W-2 Table (PRPCW2)

The application features the following updates:

- New fields were added to the FED_W2_FILE and FED_W2C_FILE tables to hold the following values:
  - Employer Tax ID
  - Employer Address
  - Employer Name
  - Employee SSN
  - Employee Name
  - Employee Address
- The application now populates the new fields for W-2s.
- The application now populates the following fields for W-2Cs from the saved values in FED_W2_FILE table:
  - Employee SSN
  - Employee Name
- Upon conversion, the application populates FED_W2_FILE and FED_W2C_FILE tables with existing employee and taxable entity data.

Manage W-2s (PRMW2)

The application now displays the employee's name and address at the time of the W-2 creation using the new fields in the FED_W2_FILE table.

Manage W-2Cs (PRMW2C)

The application now populates the previously reported SSN and employee name from the new fields in the FED_W2_FILE table. The fields will remain enabled.

Print W-2s (PRRW2)

The application now populates the employer and employee name and address information from new fields in the FED_W2_FILE table. This will show the employee and employer information at the time the W-2 was created.

W-2s (ESMELECW2)

The application now displays the Employer Tax ID, Employer Address, Employer Name, Employee SSN, Employee Name, and Employee Address from the W-2 table (FED_W2_FILE) instead of from the associated table (TXBLE_ENTITY, EMPL). This allows employees to view the original addresses.

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report now includes information about the new columns in the FED_W2_FILE and FED_W2C_FILE tables.

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip

- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Form W-2 Support for Tax Year 2023

Costpoint has been fully tested to support the pre-printed Form W-2 from Deltek's partner form vendors for the 2024 filing. If you encounter alignment issues when you print on pre-printed forms, you may need to adjust the margins on your printer settings or Costpoint's page setup. Refer to your printer's documentation for information on how to configure the margins of your printer.

Print/Email W-2 and Support Prior Year W-2s in Employee Self Service

Employers can now allow their employees to view and print their W-2s in the correct format from Employee Self Service. New print options are available for employees on the W-2s screen in ESS, which administrators can control through the Manage Taxable Entity Settings screen.

W-2s (ESMELECW2)

A new **Download and Email** button allows employees to download and/or send via email their copies of Form W-2 as a PDF file. This process is applicable only if the payroll year of the W-2 is 2023 or later. The button launches a parameter window with the following fields.

Field	Description
Payroll Year	From the drop-down list, select the tax year of the Form W-2. The printing of Form W-2 on actual forms is applicable beginning tax year 2023 only. The values in this drop-down list include the system year and the last four years. The tax years will be further limited based on the Minimum W-2 year and Maximum W-2 Year on the Manage Taxable Entity Settings screen. Examples: ▪ If the system year is 2023 and the range of W-2 years on the Manage Taxable Entity Settings screen is 2019-2023, then the drop-down list will have 2023 only. ▪ If the system year is 2023 and the range of W-2 years on the Manage Taxable Entity Settings screen is 2023-2027, then the drop-down list will have 2023 only. ▪ If the system year is 2024 and the range of W-2 years on the Manage Taxable Entity Settings screen is 2023-2027, then the drop-down list will have 2024 and 2023. ▪ If the system year is 2028 and the range of W-2 years on the Manage Taxable Entity Settings screen is 2020-2029, then the drop-down list will have 2028, 2027, 2026, 2025, and 2024. The default value is the year of the current selected record.
Download	Select this option to download the Form W-2 PDF file. This is the default selection.

Field	Description
E-mail	Select this option to send via email the Form W-2 PDF file as an attachment.
Download and E-mail	Select this option to download and send via email the Form W-2 PDF file.
E-mail Address	This field displays the work email if specified on the Manage Employee Information screen as the default. Otherwise, it shall default from the home email. You may also specify another email address.
Company Name	Enter, or click Lookup to select, the company name.
Submit	Select this button to perform the downloading and/or sending via email of Form W-2.
Close	Select this button to close the parameter window.

Manage Taxable Entity Settings (AOMESSCS)

The Manage Taxable Entity Settings screen provides the following new fields and subtask:

Field	Description
Allow download and email of W-2s	Select this checkbox to allow employees to download or send via email their copies of Form W-2 (B, C, 2, Instructions).
Print only the last 4 numbers of SSN	When this checkbox is selected, employees' SSN will display only the last four numbers on the employees' copies of the tax forms.
Tax Forms Subtask	Use this subtask to configure settings related to the electronic delivery of tax forms. This subtask contains the following fields: ▪ **Tax Form**: From the drop-down list, select which employee tax form to set up. Valid options are 1095-C and W-2/W-2c. ▪ **From**: Enter the email address that will display when tax forms are sent to employees' email address. ▪ **Subject**: Enter the email subject that will display when tax forms are sent to employees' email address. If this field is blank, then the default email subject that will be used by ESS is: <Calendar Year>space<Tax Form>. ▪ **Body**: Enter the email text that will display when tax forms are sent to employees' email address. If this is blank, then the default email text that will be used by ESS is: "The <Tax Form> is attached to this email."

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report now provides information about the following, which were added for this feature.

- SSN4ONLY_FL and ALLOW_W2_PRNTEMAIL_FL columns in the ESS_SETTINGS table
- ESS_TAX_FORMS table

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Roth-Only Catch Up Contributions For High Earners and the Option For Roth Employer Match and Non-Elective Contributions

The United States Congress passed the Secure Act 2.0 which requires employees who made above a certain amount in the prior year to make catch-up contributions to a post-tax Roth individual retirement account (IRA) instead of a pre-tax 401k. The Secure Act 2.0 implementation was later deferred by Congress until 2026.

To address the requirements of the new legislation, Costpoint added a new report to display employees who qualify for catch-up contributions, their deductions, age, and income. On the Manage Federal Taxes screen, a new field was also added to hold the prior year's income requirement threshold for Roth IRA's.

In addition, the Secure Act 2.0 section 127 permits employers to offer short-term emergency savings accounts (ESAs) to non-Highly Compensated Employees. A new deduction was added for Emergency Savings Accounts.

Print Employees Eligible for Retirement Catch-Up (PRPCATCHUP)

Use this screen to print information relating to employees over 50 with catch-up retirement contributions. Print this report any time to see if employees have reached their catch-up limit or to determine which employees meet the high-income threshold for the previous year. The high-income threshold is part of the Secure Act 2.0, which was deferred until 2026.

You can print the report for:

- All or one pay cycles
- A specific date in time which will be used to calculate employee ages, YTD contributions, and deductions, and determine the previous year for wage purposes.
- Specific deduction types (Deferred or Roth only)
- Employees by earning group (High earners, regular earners, or both types)
- Employees by age group

The application will use the new **Roth Catch-Up Wage Threshold** field on the Manage Federal Taxes screen to determine the threshold for high earners. The report displays the employee's prior year earnings, age, earning type, deduction code, deduction type, YTD deduction amount, contribution code, contribution type, YTD contribution amount, and the total YTD deduction/contribution amount. When the first sort is by employee, the report has a subtotal for each employee for YTD deduction/contribution amounts and the total of deduction/contribution amount.

Manage Federal Taxes (PRMFTI)

The Manage Federal Taxes screen adds the following field:

Field	Description
Roth Catch-Up Wage Threshold	Enter the prior year wage threshold amount that was defined by the U.S. government at which retirement contribution catch-ups will be required to be in a post-tax Roth IRA. This amount will be used by the Print Employees Eligible for Retirement Catch-Up screen to determine which employees must make retirement catch-up contributions to a post-tax Roth IRA.

Manage Deductions (PRMDED)

A new **Emergency Savings Accounts (ESA)** deduction type, which can be used by employers who offer short-term ESAs to non-Highly Compensated Employees, was added to the Manage Deductions screen.

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.23.5001.exe
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

State

2024 SUTA Wage Base

This Costpoint release adds tax table records effective January 1, 2024 on the Manage State Taxes screen for states where the unemployment-taxable wage base has been updated for tax year 2023.

Connecticut

The unemployment-taxable wage base increases from $15,000 to **$25,000**.

Iowa

The unemployment-taxable wage base increases from $36,100 to **$38,200**.

Missouri

The unemployment-taxable wage base decreases from $10,500 to **$10,000**.

Nevada

The unemployment-taxable wage base increases from $40,100 to **$40,600**.

New Jersey

The unemployment-taxable wage base increases from $41,100 to **$42,300**.

New York

The unemployment-taxable wage base increases from $12,300 to **$12,500**.

Vermont

The unemployment-taxable wage base increases from $13,500 to **$14,300**.

Washington

The unemployment-taxable wage base increases from $67,600 to **$68,500**.

Wyoming

The unemployment-taxable wage base increases from $29,100 to **$30,900**.

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

California 2024 Tax Table Updates

The following are the tax table updates for California effective 01/01/2024:

- The annual low income exemption threshold increases to **$17,769** or **$35,538**, up from $17,252 or $34,503, depending on the employee's filing status and, for married employees, the number of allowances claimed.
- The annual standard deduction increases to **$5,363** or **$10,726**, up from $5,202 or $10,404, depending on the employee's filing status and, for married employees, the number of allowances claimed.
- The value of a state allowance increases from $154 to **$158.40** annually.
- The tax rates used in Method B continue to range from 1.1% to 14.63%. The tax brackets used are to be adjusted compared to 2023.

To support the state updates, this release adds records effective 01/01/2024 on the following screens:

- Manage State Taxes
- Manage State Standard Deductions
- Manage State Tax Withholding Adjustments
- Manage State Tax Tables

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

California Creditor Debt Garnishments Formula

Costpoint now supports the California garnishment calculation to allow Payroll users to comply with the state's garnishment regulations. This release adds a new calculation method on the Manage Employee Garnishments application to allow Payroll users to set up the new CA garnishment calculation.

Manage Employee Garnishments (PRMEGARN)

The Manage Employee Garnishments screen features the following updates:

- A new calculation method, **(DI-(MxSMW))xP**: Disposable Income - (Limit 1 Weekly Multiplier x State Minimum Wage) x Limit 1 Percentage, was added to the **Limit 1 Calculation Method** field.
- The **Limit 1 Calculation Method** field was changed from a drop-down list to a data field with Lookup.
- The following field was added to the Garnishment Calculation subtask:

Field	Description
Limit 1 Percentage	Enter the percent for Limit 1. This will be used when the Limit 1 Calculation Method is set to **(DI-(MxSMW))xP**: Disposable Income - (Limit 1 Weekly Multiplier x State Minimum Wage) x Limit 1 Percentage.

Compute Payroll (PRPCPR)

The Compute Payroll application's garnishment calculation was updated to calculate the correct amount when the new Limit 1 Calculation Method, **(DI-(MxSMW))xP**, is selected for the employee on the Manage Employee Garnishments screen.

View Garnishments (PRQEGARN)

The View Garnishments screen features the following updates:

- A new calculation method, **(DI-(MxSMW))xP**: Disposable Income - (Limit 1 Weekly Multiplier x State Minimum Wage) x Limit 1 Percentage, was added to the **Limit 1 Calculation Method** field.
- The following field was added to the Garnishment Calculation subtask:

Field	Description
Limit 1 Percentage	This field displays a value when the Limit 1 Calculation Method is set to **(DI-(MxSMW))xP**: Disposable Income - (Limit 1 Weekly Multiplier x State Minimum Wage) x Limit 1 Percentage.

Print Data Dictionary Report (SYRDD)

The report now provides information for the new Limit 1 Percentage (GRN_L1_PCT) column on the following tables:

- Employee Garnishments Calculation Rules (EMPL_GRN_CALC)
- Employee Garnishments-Garnishment Calculation (EMPL_GRN_CALC_ADT)

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Colorado Q3 2023 SUTA Electronic Filing: Updated File Formats in the New System

The ICESA file format in the old MyUI Employer system has been updated in the new MyUI Employer+ system for Q3 2023 reporting.

The following are updates to the ICESA file format allowed by Colorado:

- **Records**
  - **Old**: The file will include two distinct types of records: the Record A and Record S.
  - **New**: The file will include Record S only.
- **Fields**

Location	Old	New
S 46	Blank	Adjustment Reason Code (0 or blank for original, 1-9 for adjustment) Numeric - Reason code for adjustment (if any) to employee wages. 0 or a blank space means original filing. Valid adjustment reason codes are 0,1,2,3,4,5,6,7,8, and 9. The code descriptions are the following: ▪ **0 or blank**: Original submission ▪ **1**: Employment and Wages adjusted because of incorrectly reported wages ▪ **2**: Wages adjusted because worker(s) were mistakenly included/excluded ▪ **3**: Employment and Wages adjusted to correct computer system, data entry or accounting errors ▪ **4**: Employment and Wages adjusted because they were reported to the wrong state ▪ **5**: Employment and Wages adjusted because the workers performed services for a different business ▪ **6**: Employment details adjusted to reflect correct 12th of the month employment information ▪ **7**: Employment and Wages Adjusted as a result of an Audit ▪ **8**: SSN or name changed ▪ **9**: Other
S 210	Blank	Officer Code Y or N or Blank. If blank, system will default to N.
S 212	Blank	Employment Data (Month 1) 1 if yes, 0 if no. If blank, system will default to 1 for yes.
S 213	Blank	Employment Data (Month 2) 1 if yes, 0 if no. If blank, system will default to 1 for yes.
S 214	Blank	Employment Data (Month 3) 1 if yes, 0 if no. If blank, system will default to 1 for yes.

Create Quarterly SUTA Tax File (PRPSMM)

The ICESA file format generated by the application reflects the following changes:

- Record A was removed.
- The new fields were added to Record S.

Manage SUTA Tax File Data (PRMSMM)

The following validations were removed from the application:

- Validation of Colorado's Reporting ID/UI Account Number as we no longer validate the format of the value of this field for each state moving forward.
- All validations related to Contact Information fields as Record A is no longer reported.

Manage SUTA Quarterly Reporting Data (PRMQRD)

The application now allows one-character adjustment reason codes.

The following Colorado adjustment reason codes were added to the S_SUTA_ADJ_RSN_CD table. You can now select these codes from the **Adjustment Reason Code** field lookup.

- **0** (Original submission)
- **1** (Employment and Wages adjusted because of incorrectly reported wages)
- **2** (Wages adjusted because worker(s) were mistakenly included/excluded)
- **3** (Employment and Wages adjusted to correct computer system, data entry or accounting errors)
- **4** (Employment and Wages adjusted because they were reported to the wrong state)
- **5** (Employment and Wages adjusted because the workers performed services for a different business)
- **6** (Employment details adjusted to reflect correct 12th of the month employment information)
- **7** (Employment and Wages Adjusted as a result of an Audit)
- **8** (SSN or name changed)
- **9** (Other)

Manage Employee Taxes (PRMETAX)

The **Owner** field is now the **Owner/Officer** field. The field now is now applicable to Colorado (CO).

> **Note:** This change is also reflected on:
>
> - The Taxes subtask of the Manage Employee Information screen
> - View Employee Taxes screen

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Kentucky 2024 Tax Table Updates

Kentucky provided the following tax updates for the 2024:

- Income tax rate decreases from 4.5% to **4%**.

- Standard deduction increases from $2,980 to **$3,160**.

Attention: For more information, refer to https://revenue.ky.gov/Forms/42A003(TCF).pdf.

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Ohio 2023 Tax Table Updates

Ohio updated its withholding methods effective November 1, 2023. This release applies the following:

- Updated values on the Manage State Tax Tables for Ohio effective 11/01/2023
- Updated the effective date to 11/01/2023 in all Ohio tax tables
- Set the **Round W/H Amount** to **N** on the Manage State Taxes screen for Ohio effective 11/01/2023 as the optional computer formula did not indicate rounding for the withholding deduction

Attention: For more information, refer to: https://tax.ohio.gov/static/employer_withholding/wht_optionalcomputerformula_2023.pdf.

This enhancement requires the following files:

- cp81_bundle_CYE2023_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Enhancements

This section includes summaries of the enhancements made to existing features in this release.

Materials

Print PO Header NAICS Code Business Size, Size Standards on Purchase Order

You can now save the NAICS Size Standards on the purchase order (PO) header and print the PO header business size and size standards on the PO regardless of the vendor size. This allows vendors to see their business size and understand the size standards that qualify them for that size.

Configure Purchase Order Print Options (POMPOPTS)

Two new checkboxes have been added to the screen.

- **Print NAICS SBA Size Std. for All Bus. Size**: Select this checkbox to print the SBA size standard linked to the PO header NAICS code regardless of the vendor's business size.
- **Print NAICS Code**: Select this checkbox to print the NAICS code when you print the purchase order (PO) and/or PO change orders. This checkbox setting will also default on the Print Purchase Orders and Print Purchase Order Change Orders screen.

Manage Purchase Orders (POMMAIN)

Several fields and checkboxes have been added to the screen.

- **NAICS Eff. Date**: This field displays the effectivity date of the NAICS code. (Header and Line)
- **SBA Std Size (M USD)**: This field displays the NAICS SBA size standard in million US dollars regardless of the vendor's size for the associated NAICS code selected on the purchase order (PO). The value will be loaded from the latest date. If both the million USD and the number of employees data are available for the selected/entered NAICS code, then both values will be displayed.
- **SBA Std Size (# of Emp)**: This field displays the NAICS SBA size standard by the number of employees regardless of the vendor's size for the associated NAICS code selected on the purchase order (PO). The value will be loaded from the latest date. If both the million USD and the number of employees data are available for the selected/entered NAICS code, then both values will be displayed.

Print Purchase Orders (PORPPO)

The following are the changes to the printing of reports:

- The **Print NAICS Code** default will now be retrieved from the Configure Purchase Order Print Options screen.
- If you select **Print NAICS Code** and **Print NAICS SBA Size Std. for All Bus. Size** on the Configure Purchase Order Print Options screen, then the NAICS code along with the associated SBA size standard information and business size will be printed only on the PO even if the business is not small.
- If you select **Print NAICS Code** but not the **Print NAICS SBA Size Std. for All Bus. Size** option on the Configure Purchase Order Print Options screen, then the NAICS code along with the

associated SBA size standard information and business size will be printed only on the PO if the PO business is small.

- If there is no SBA size information available for the NAICS code, then Costpoint will not print the SBA size label on the report. If million USD and number of employees - SBA size standard information are both available, both will be printed. If one of the SBA information is blank or zero, then either the SBA Size Standards (M USD) or (1000 EMPL) will be printed on the report.
- The Business Size label should not print on the report if the value is None/Null.
- If the option to print the NAICS code is not selected, neither the NAICS code nor the SBA information will be printed.

The same changes apply to the Print Purchase Order Change Orders (PORPCO) screen.

Create Blanket Purchase Order Releases (POMRELS)

When you create PO releases, Costpoint now defaults the Blanket PO's NAICS Code, Effective Date, and SBA size standard.

Create Purchase Order Change Orders (POMCHNG)

The application now copies the NAICS effective date and SBA size standards to the record when you create a change order.

Archive Purchase Orders (POPARCH)

The application now copies the NAICS effective date and SBA size standards as part of the archived purchase order.

View Purchase Order Status (POQSTAT)

The **Vendor Classifications** group box has been rearranged to include the following fields:

- **SBA Std Size (M USD)**: This field displays the NAICS SBA size standard in million US dollars for the associated NAICS code selected on this purchase order (PO). The value will be loaded from the latest date. If both the million USD and the number of employees data are available for the selected/entered NAICS code, then both values will be displayed.
- **SBA Std Size (# of Emp)**: This field displays the NAICS SBA size standard by the number of employees for the associated NAICS code selected on this purchase order (PO). The value will be loaded from the latest date. If both the million USD and the number of employees data are available for the selected/entered NAICS code, then both values will be displayed.

The same changes apply to the View Purchase Order Change Orders (POQCHNG) screen.

Import Purchase Orders (AOPUTLPO)

When the input file is processed, it defaults the SBA size standard for the NAICS code and effective date on the PO header.

Create Purchase Orders (PPPGPO)

When Costpoint loads the NAICS Code from the requisition line to the generated purchase order, it will also load the corresponding NAICS effective date and SBA size standards.

If the given NAICS code and effective date combination in the original record is currently inactive, but there are other active effective dates for the NAICS code, the latest active effective date will be used.

Set Up Company (SYPCOMP)

Costpoint will copy the default values from Configure Purchase Order Print Options screen for the SBA Size Standard for all business sizes when setting up a new company.

Manage Vendor Returns (RCMRTRN)

Two new fields have been added to the screen.

- **SBA Std Size (M USD)**: This field displays the NAICS SBA size standard in million US dollars for the associated NAICS code selected on the purchase order (PO). The value will be loaded from the latest date. If both the million USD and the number of employees data are available for the selected/entered NAICS code, then both values will be displayed.
- **SBA Std Size (# of Emp)**: This field displays the NAICS SBA size standard by the number of employees for the associated NAICS code selected on the purchase order (PO). The value will be loaded from the latest date. If both the million USD and the number of employees data are available for the selected/entered NAICS code, then both values will be displayed.

In addition, when you create a new purchase order, the application defaults the NAICS SBA Size (M USD and No. of Employees) for the NAICS Code and NAICS Eff Date combination.

This enhancement requires the following files:

- DeltekCostpointMaintenanceRelease_8.1.26.50xx.exe (Please see the version of the .exe file posted and available for download.)
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe
- cp81_cmnlib_MMQSTATLIB_001.zip
- cp81_sypcomp_001.zip
- cp81_dbc_810_11242_001.zip
- cp81_poparch_001.zip
- cp81_aoputlpo_001.zip
- cp81_pommain_001.zip
- cp81_poqchng_001.zip
- cp81_pompopts_001.zip
- cp81_porpco_001.zip
- cp81_rcmrtrn_001.zip
- cp81_pppgpo_001.zip
- cp81_porppo_001.zip
- cp81_pomchng_001.zip

Software Issues Resolved

Accounting

Accounts Payable » Manage Accounts Payable Vouchers

Defect 1944943: You were able to save a voucher that contains a line with an **Account** that is not linked to a project account group. This occurred when you:

1. Left the **Fiscal Year**, **Period**, and **Subperiod** fields blank.
2. Entered the voucher line.
3. Saved the record and encountered an error message requiring the **Fiscal Year**, **Period**, and **Subperiod**.
4. Entered a **Fiscal Year**, **Period**, and **Subperiod**.
5. Saved the record again.

Defect 1982619: This application has been enhanced to display an error message if the total of the **Amount** column on the Vendor Labor subtask is not equal to the **Total Amt** of the voucher detail line.

General Ledger » Create Purchase Order Accruals

Defect 1937399: Costpoint incremented the **Last System Number** on the Manage System Assigned JE Number screen even if the accrual entry you entered was not saved successfully.

Framework

Framework

Defect 2014321: After attaching multiple documents in Costpoint, the data within SharePoint did not update.

Defect 2016696: The copyright date listed on the Costpoint versions 8.0, 8.1, and 8.2 Login screens showed the Costpoint Copyright Date as 2018 and needed to be updated to the current year.

Defect 2022656: Setting the Suppression Type to Labor had no effect on an extensibility field. The field did not behave as standard UI Labor suppressed fields.

Defect 2028007: When a workflow that was linked to a screen added by an extension was present, the Approval Workflow Model screen was extremely slow in querying and updating records. Also, the screen that was added by the extension performed slowly when processing.

Runtime

Defect 1954016: When a timesheet already existed and you changed the class revision explanation setting from Disabled to Required, the first auditable revision dialog box popped up and was then hidden, causing changed data to be unsaved.

Defect 2001203: The Revision Explanation in Timesheets displayed and then disappeared, resulting in the need to save a second time, at which point the dialog box remained visible.

Runtime » Client

Defect 2028874: The Requisition Workflow email failed to open the Approve Requisition application screen with query conditions set.

Runtime » Server

Defect 2032793: When using content management integration, you received an exception error when you uploaded an existing file with the overwite option.

Materials

Bills of Material » Print Indented Bills of Material Report

Defect 2029828: When you ran the Print Indented Bills of Material Report with the **Include Scarp/Yield Quantities** and **Multiply Out Subassembly Quantities** checkboxes selected, the quantity per assembly was calculated incorrectly compared to the MRP calculation.

Bills of Material » Print Summarized Bills of Material Comparison Report

Defect 2026705: When you ran Print Indented Bills of Material Report, the summarized BOM reflected a different quantity than on the View Bills of Material screen.

Bills of Material » Print Summarized Bills of Material Report

Defect 2026707: When you ran Print Indented Bills of Material Report, the summarized BOM reflected a different quantity than on the View Bills of Material screen.

Bills of Material » View Bills of Material

Defect 2026243: When you ran Print Indented Bills of Material Report, the parts with compiled yields were calculated incorrectly.

Engineering Change Notices » Apply Engineering Change Notices

Defect 2021215: When you implemented an Engineering Change Notice (ECN), the application did not update the MBOM release user or release date in the Part table.

Engineering Change Notices » Manage Engineering Change Notices

Defect 2023341: The application has been updated so that when a table has a foreign key with null values in any of the columns, the application should not resolve to a related record in the referenced table.

Defect 2026698: When you clicked the link on the rejected email notification, the link took you to the ECN screen with all ECNs selected and not to the referenced ECN in the email.

Defect 2027053: You were unable to update EBOM components and encountered an error.

Inventory » Create Physical Count Adjustments

Defect 2030357: When the physical count adjustments had positive and negative lot adjustments, the application created only one net adjustment inventory tran line, which caused serial/lot reconciling issues on the Reconcile Inventory Balances screen.

Inventory » Create Physical Counts

Defect 2004379: When you created a new cycle count, previewed the data, but did not execute, you were unable to update the other cycle counts on the Manage Actual Counts screen, and you encountered the following error: "This part/Warehouse/location/inv abbreviation is currently locked by another physical count. It cannot be added/deleted at this time."

Inventory » Enter Issues to Project/Account/Org or PO

Defect 2029914: When you copied and pasted records from Excel into an issue, the records were pasted except for the description. When you then tried to save the issue, you encountered a critical NullPointerException error.

Defect 2030350: When you created an Issue to Project/Account/Organization via Web Services, you received a NullPointerException error.

Inventory » Manage PO/Req Inventory Reservations

Defect 2028921: When you set **Auto Positioning** to **No** on the Configure User Preferences screen, the **Autoload PO/Req Info** button was not visible on the Manage PO/Req Inventory Reservations screen.

Inventory » Manage Serial/Lot Information

Defect 2032986: When you updated a serial-tracked record by adding Notes or UID Info, the application saved the lot number as a space instead of Null. Subsequent add transactions for the serial number populated the invt_trn_ln_sr_lt or invt_whs_loc_sr_lt table with a blank lot number similar to MO rework. Also, when you added lot or serial numbers, the other tracking method was not populated.

Inventory » Reconcile Inventory Balances

Defect 2016618: The application has been updated to display records with negative calculated trans serial/lot quantity in the Serial/Lot report 2.

Master Production Scheduling » Update Master Production Schedules

Defect 2015958: When you ran MRP, the MRP substitutes did not use the quantities of substitute parts per planning order.

Material Requirements Planning » Firm Material Requirements Planning Planned Orders

Defect 2032530: When you ran MRP, the application failed to complete the process due to poor Oracle execution plans in Phase 1 of 5: Preprocess - Reloading MRP tables.

Material Requirements Planning » Manage Detailed Part Schedule

Defect 2022635: When you entered a pre-release part/revision, you encountered an error.

Material Requirements Planning » Update Material Requirements Plan

Defect 2015797: When you ran MRP, the MRP substitutes did not use the quantities of substitute parts per planning order.

Procurement Planning » Apply PO Info to Purchase Requisitions

Defect 2022631: When you entered a subcontract ID on the header, Costpoint overrode the performance start/end dates on the requisition line, which caused the requisition to be resubmitted for approval. Dates should not be overridden on the line.

Defect 2022640: The application has been updated so that when a table has a foreign key with null values in any of the columns, the application should not resolve to a related record in the referenced table.

Procurement Planning » Create Purchase Orders

Defect 1998058: When you verified the sales tax/VAT amount and sales tax VAT rate on the purchase order (PO), the amount and rate were not taken from the requisition for the PO.

Procurement Planning » Manage Purchase Requisitions

Defect 2015115: When you clicked the **Unit Cost** lookup, Costpoint displayed Last for the Cost Type but not the Reference Cost Type.

Defect 2022626: When you created a purchase order (PO) for a supplier with a non-GBP currency (Functional), it was not converted to the correct EUR currency (Transactional). Costpoint pulled the item cost as transactional and converted it to functional.

Purchasing » Buyer Dashboard

Defect 2018882: The Past Due Deliveries report inaccurately included records where a Delivery Schedule existed, but the quantity on the Delivery Schedule line had already been received.

Purchasing » Manage Buyer Actions

Defect 2034453: The application inaccurately included records where a delivery schedule existed, but the quantity on the Deivery Schedule line had already been received.

Purchasing » Manage Purchase Orders

Defect 2023308: When the vendor was not a supplier vendor, you were able to release a pending purchase order (PO) to the vendor, but you were unable to do so via Web Integration Console (WIC).

Defect 2032619: When you added a subcontract ID to an existing PO where all **Period of Performance** (POP) fields were blank, the POP fields were populated based on the Subcontract ID. However, when you added the Subcontract ID to an existing PO where all POP fields were populated, the POP fields were changed based on the subcontract ID.

Purchasing » Print Purchase Orders

Defect 2028017: When you printed a PO that had a service line without a Ship ID, Costpoint printed the following: "Tax Exempt Cert No: null". However, when you added a Ship ID to the line, Costpoint did not print anything.

Sales Order Entry » Approve Sales Orders

Defect 2022643: The application has been updated so that when a table has a foreign key with null values in any of the columns, the application should not resolve to a related record in the referenced table.

Sales Order Entry » Import Sales Orders

Defect 2026692: The application did not validate the SO line type against the item type and allowed non-part lines to use an inventory line type with an inventory abbreviation. This same action results in a hard error in the User Interface (UI) but was allowed in this case for import action.

Sales Order Entry » Manage Sales Orders

Defect 2014439: When you saved the changes you made on a sales order (SO), the COMP_INVC_FL table reverted to Y even though the SO line was fully invoiced.

People

Affirmative Action » Print EEO-1 Report

Defect 2012465: The **Component 2 Pay Data** and **Additional Employee Data** report types did not include an employee who had a record on the Manage W-2s screen but had no record on the Manage Employee Earnings History screen.

Benefits » Manage Benefit Plans

Defect 2028621: When you added a new benefit plan for a system benefit type of **OTHER2 - OTHER9**, the screen disabled **Age Based on** options and set the option to **Employee**. The radio buttons should be enabled for those system benefit types. The **Benefit Type** field should include Spouse Critical Illness insurance.

Employee » Import Employee Data

Defect 2014312: When the standard hours were **0.00** in record 2, the Estimated Annual Hours on the Manage Employee Salary Information screen were not updated.

Employee Self Service » Address/Phone

Defect 2017839: When you selected **OFFICE** from the **Type** field on the Other Addresses subtask, the screen did not allow you to delete the value or the row.

Employee Self Service » Designate Beneficiaries

Defect 2023318: An error message should display if you change a beneficiary, who has existing current beneficiary records, to a dependent. The application should display all records in the HB_EMPL_LIFE_BNFIC table for the employee.

Employee Self Service » Life Events/New Hires

Defect 2009214: When you saved the record for the first time without making changes on the AD&D tab, the following information message did not include AD&D: "The following tabs have not been modified so their status will be set to 'No change'." When you saved the record again for a benefit type that was still not AD&D, the same message displayed for AD&D alone.

Leave » Create Quarterly Family and Medical Leave File

Defect 2016262: The report displayed incorrect paid family and medical leave pay type earnings calculation. The application should check if:

- The employee has COPFML deductions and/or COPFML contributions.
- The amount is still within the Social Security wage limit.

Payroll » Manage Employee Earnings History

Defect 2015214: You encountered a system error when you saved an amount with decimal values in the **Other Income** field on the Employee Tax Setup tab.

Payroll » Print W-2s

Defect 2024554: A system error occurred when you printed a W-2c record.

Defect 2024657: A system error occurred when you printed or processed the W-2 using either the **Pre-printed** or the **Blank Stock/Plain Paper (Saved as PDF Files)** option. The error indicated the following: "STATE_EMPL_FL" at line 1, column 347."

Defect 2025805: A system error occurred when you printed or processed the report for a non-contiguous range of home organizations.

Defect 2035623: The 2023 W-2c Substitute Copy A (SSA-Approved) and W-3c form generated by the application has been approved by SSA. You must apply this hotfix to be able to generate the 2023 W-2c and W-3c PDF forms.

Planning

Administration » Delete Historic Project EACs

Defect 2016101: You encountered a system error when you selected the option **One** for the **Project** field and Lookup did not display the project list.

Administration » Maintain Project Budget Security

Defect 2018959: When you tried to select a project ID, you encountered a system error and Lookup did not display the project list.

Administration » Report Table Update Process

Defect 2012939: When you selected the **Post Labor Distribution to GL as Summary Entry** option in Configure General Ledger Settings (**Accounting » General Ledger » General Ledger Controls**) and then ran the Refresh process, EREPORT_PROJ_DETAILS and EREPORT_PROJ_TRENDS did not display the correct values and also did not tally with LAB_HS.

Defect 2016856: You encountered a refresh process error when the revenue algorithm did not include PROJ_SUM period changes.

Administration » User Maintenance

Defect 2017071: The **Security Org ID** lookup has been updated to display the **Organization ID** and **Organization Name** in separate columns.

New Business Budgeting » Structured New Business Budget Summary (Revenue/Cost)

Defect 2021467: The **New Business Budget ID** was not auto-capitalized.

Organization Budgeting » Profit and Loss Chart - Cumulative

Defect 2028543: The **Org ID** was not auto-capitalized.

Organization Budgeting » Profit and Loss Chart by Period

Defect 2028541: The **Org ID** was not auto-capitalized.

Project Budgeting » Budget/EAC Status

Defect 2018958: The following sections have been added with options to display top-level projects.

- Details section
  - **All**: This option displays all projects.
  - **Budgets/EACs Only**: This option displays projects that include budgets or EACs.
  - **No Budgets**: This option displays projects without budgets.
- View section
  - **Combined**: This option displays a combined report that allows better data viewing and exporting to Excel.

Defect 2018963: The application has been updated to enable budget/EAC calculations for any remaining top-level and lower-level projects that have start and end dates.

Defect 2018968: The option to include Inactive Tasks has been removed from this report to make it consistent with other reports.

Project Budgeting » Import Budget/EACs from Excel

Defect 2012136: You encountered a validation routine error when you tried to import budgets or EACs from Excel. The routine looked at accounting periods instead of budget periods.

Project Budgeting » Project Budgets / EACs

Defect 2016096: The code for the **Final Version** checkbox of budgets/EACs has been refactored.

Defect 2016099: The application now allows you to delete older versions of budgets or EACs.

Defect 2021187: The application has been updated to enable the addition of employees with Family Medical Leave (FML) status into working budgets or EACs through the Hours subtask. The employee lookup displays the employees with FML status.

Defect 2021207: The Employee Status column has been added to the Staff Hours subtask of a budget/EAC to enable the deletion of inactive employees from their indirect budgets and to improve performance. The Employee Status has also been added as a new item on the Query tab.

Defect 2027769: The ability to create a new budget from any committed budget/EAC has been added.

Projects

Billing » Adjust Open Billing Detail Records

Defect 2002714: When you updated the **Hours On Hold** column in the Open Billing Detail table window, a prompt to recompute or recalculate was not displayed.

As a workaround, manually compute and enter the **Hours On Hold** and **On Hold Amount** values.

Billing » Create Unbilled Analysis Report Tables

Defect 2018901: You were unable to run this application when you selected **All** from the **Project** drop-down list.

Cost and Revenue Processing » Compute Cobra Burden Costs

Defect 2034530: The integration should transfer Costpoint's Configuration Name and Integration Owner to Cobra. This will allow users to select the configuration/parameters that will be used in Cobra.

Cost and Revenue Processing » Compute Revenue

Defect 2021130: Performance tuning has been conducted for this application.

Defect 2022652: When you ran this application, Costpoint backed out previous over ceiling amounts, which caused an incorrect **Other Fee** value.

Cost and Revenue Processing » Post Revenue

Defect 2000188: You did not receive an error message when you ran this application for an award fee account that had no linked account/organization.

Defect 2003901: When you ran this application for an unbilled account that was not linked to the project's owning organization, you did not encounter an error message, and Costpoint completed the process.

Inter-Company Work Orders » Create IWO Allocations

Defect 2022089: Performance tuning has been conducted for this application.

Defect 2022349: When you used a job server with the **Use Default** or **Halt** option selected on the Manage Jobs screen and the job setup includes running Create IWO Allocations, Costpoint did not stop the process even though Create IWO Allocations returned error messages.

Project Setup » Manage Employee Work Force

Defect 1967406: You received the following error message when the selected employee's current date is equal to the end date in the employee's salary details: "You do not have access to this Employee."

Reports & Analytics

Business Intelligence » Business Intelligence

Defect 2028843: Custom reports had missing data for Project Budget and Hours information because data was displayed for new business only and did not include existing projects. This defect affects you if you also run the Revenue Forecast report and Labor Utilization Forecast report that include new business and existing projects.

Time & Expense

Expense » Expense Report

Defect 1994364: When a workflow contained multiple tasks of a different type, the expense report closed after you approved the first task.

Defect 2013891: You were unable to edit the value in the **Expense Date** field.

Defect 2017438: You received a system error when you added an attachment and the multi-select row feature was still selected.

Defect 2026701: When you searched for and opened an approval task, the **Approve** button should have been enabled even though your backup role was unassigned.

Defect 2032778: When you submitted a corrected expense report, the approval workflow was not relaunched, and the expense report status was automatically approved.

Time » Manage/Approve Timesheets

Defect 2017861: After the preapproved timesheet procedure returned a warning message and you declined to approve a record, the status changed to Approved after you approved the next record.

Defect 2018894: When you were assigned a role with no permission to approve multiple rows, the **Approve** button was not disabled.

Defect 2025806: When you approved a timesheet, you received the following error message: "TSApproveRSLineValidation.validateRow-----java.sql.SQLSyntaxErrorException: ORA-01795: maximum number of expressions in a list is 1000".

Defect 2036800: When Auto-Position was off, the **Filter Value** field was shortened, and you were unable to enter a value unless you pressed the TAB key.

Time » Resource Schedules/Leave

Defect 2010844: When the default start and stop time for any work section fields was 12:00 AM, you received an error message indicating that the leave start time must be before the leave end time.

Time » Timesheet

Defect 2008847: When you copied data from one project to paste into another, you received an error message indicating that the record already exists, even though it does not.

Defect 2018908: When you were assigned a role with no permission to approve multiple rows, the **Approve** button was not disabled.

Defect 2027747: When you deleted a start/stop line, the timesheet hours did not update correctly after saving.

Time » Timesheet Classes

Defect 2032325: When you added or changed the total time method to Hours Proration, the PRORATE_TS_FL column remained set to N instead of changing to Y.

Time » Work Schedule/Leave

Defect 2021324: When the default start and stop time for any work section fields was 12:00 AM, you received an error message indicating that the leave start time must be before the leave end time.

Security Enhancements

There are no security enhancements or security issues addressed in this release.

Database Changes

Database Change documents detail data dictionary changes from one release to the next. To see the Database Change document for this MR, refer to 8.1.x Data Dictionary Updates.

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.

About Deltek

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