

Deltek Costpoint® 7.1.1

Cumulative Release Notes for December 2017

December 27, 2017

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Overview

This document is a compilation of the release notes distributed for the enhancements made in Costpoint, Budgeting and Planning, and Time & Expense that are released in December 2017. This document includes descriptions of the enhancements in relation with system jars, application jars, libraries, and regulatory updates since the last system jar release.

Platform Changes

Support for Windows Server 2016 was added to the following:

- Costpoint 7.0.1 and 7.1.1
- Time & Expense 10 and 9.0.1
- Budgeting & Planning 6.0 and 7.0

WebLogic 12.1.3 October 2017 CPU Support for Costpoint 7.1.1

The Costpoint 7.1.1 Framework installer has been updated to include support and compatibility for WebLogic 12.1.3 Oracle Critical Patch Update (October 2017). The update aims to address multiple security vulnerabilities.

Requirements

This enhancement requires p26519417_121300_Generic.zip.

Installation Instructions

Custom Programs Affected

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

To Download the HotFix/Feature Update:

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

To Install the HotFix/Feature Update:

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

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

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

To Check to See if the HotFix is Installed:

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

To Check to See if the Feature is Installed:

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

Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

More Information:

If you have any questions, please contact Deltek Support Center at <https://deltek.custhelp.com>.

Costpoint

Accounting

Changes were made in the Accounting domain in relation with the new Contract Management feature. To know more about this new feature, see the *DeltekCostpoint711LAReleaseNotesContractManagment.pdf*.

Projects

Contract Management

Costpoint now provides additional contract management capabilities through the new Contract Management module available in the Projects domain. With this module, you can:

- Track opportunities within Costpoint and use this information to initiate a contract or a project.
- Track bid and proposal costs from the opportunity to a Costpoint project.
- Track organizational conflicts of interest (OCIs) and link them to opportunities, contracts, and/or projects.
- Manage contract or flow-down clauses between prime contractors and subcontractors.
- Manage customer, vendor, and employee information.
- Streamline the project initialization process.
- Track information from the beginning of the opportunity through contract closeout.

You can manually add opportunities to this module or import opportunity data from GovWin IQ.



In this limited availability (LA) release, the functionality to import opportunities from GovWin IQ is not yet available. GovWin IQ integration for Contract Management together with the new Import GovWin IQ Data screen will be rolled out in the general availability (GA) release.

Once you win the opportunity, you can create a contract and link it to the opportunity. You have the option to associate the contract to a Costpoint opportunity, and also create a contract for an opportunity that does not exist in your Costpoint database. You can create and monitor subcontract information and link subcontract records to contracts and projects.

Within the opportunities, contracts, and and/or subcontracts screen, you have the ability to:

- Add activities and documents related to the opportunity, contract, and/or subcontract.
- Identify employees and other team members who will be working on the opportunity, contract, and/or subcontract.
- Create and/or update contract/subcontract modifications.
- Initialize projects to include information that already exists in the Contract Management module.
- View projects linked to the opportunity, contract, and/or subcontract.
- View and print a project status report (PSR)

Screens that you can use to set up and maintain overall settings for Contract Management are also available in this module.



For an overview demonstration of this feature, refer to Costpoint 7.1.1 Contract Management Overview video, which you can view at

<https://help.deltek.com/Product/Costpoint/USS/Projects/ContractManagementOverview> .

Patch and System JAR Requirements

This feature requires the following:

- Costpoint 7.1.1 System JAR 036 (cp711_sys_036.zip)
- Common Library – CTLIB (cp711_cmnlb_CTLIB_001.zip)
- Common library – PJMASSADD (cp711_cmnlb_PJMASSADD_001.zip)

In addition, the following patches are required for this release:

- | | | |
|--------|--------|--------|
| ▪ 3177 | ▪ 3244 | ▪ 3296 |
| ▪ 3197 | ▪ 3245 | ▪ 3297 |
| ▪ 3201 | ▪ 3260 | ▪ 3305 |
| ▪ 3205 | ▪ 3263 | ▪ 3315 |
| ▪ 3206 | ▪ 3264 | ▪ 3317 |
| ▪ 3209 | ▪ 3265 | ▪ 3318 |
| ▪ 3214 | ▪ 3269 | ▪ 3325 |
| ▪ 3215 | ▪ 3271 | ▪ 3328 |
| ▪ 3220 | ▪ 3274 | ▪ 3336 |
| ▪ 3222 | ▪ 3278 | ▪ 3352 |
| ▪ 3223 | ▪ 3286 | ▪ 5074 |
| ▪ 3233 | ▪ 3289 | ▪ 5078 |
| ▪ 3234 | ▪ 3290 | ▪ 5085 |
| ▪ 3236 | ▪ 3291 | ▪ 5102 |
| ▪ 3237 | ▪ 3292 | |

Application JAR Requirements

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMOPP	Manage Opportunities	cp711_ctmopp_001.zip
Projects	Contract Management	CTMCNTR	Manage Contracts	cp711_ctmcntr_001.zip

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMSBCNTR	Manage Subcontracts	cp711_ctmsbcntr_001.zip
Projects	Contract Management	CTQSUBC	View Subcontract Inquiry	cp711_ctmsubc_001.zip
Projects	Contract Management	CTMOCI	Manage Organizational Conflict of Interest (OCI)	cp711_ctmoci_001.zip
Projects	Contract Management	CTMCUST	Manage Contract Management Customer Info	cp711_ctmcust_001.zip
Projects	Contract Management	CTMCUSTA	Approve Prospective Customers	cp711_ctmcusta_001.zip
Projects	Contract Management	CTMVEND	Manage Contract Management Vendor Info	cp711_ctmvend_001.zip
Projects	Contract Management	CTMVENDA	Approve Prospective Vendors	cp711_ctmvenda_001.zip
Projects	Contract Management	CTMEMPL	Manage Contract Management Employee Info	cp711_ctmempl_001.zip
Projects	Contract Management	CTMSETNG	Configure Contract Management Settings	cp711_ctmsetng_001.zip
Projects	Contract Management	CTMACTM	Manage Activity Methods	cp711_ctmactm_001.zip
Projects	Contract Management	CTMACTS	Manage Activity Subject	cp711_ctmacts_001.zip
Projects	Contract Management	CTMAGENC	Manage Agencies	cp711_ctmagenc_001.zip
Projects	Contract Management	CTMROLES	Manage Contract Management Roles	cp711_ctmroles_001.zip
Projects	Contract Management	CTMCNTVEH	Manage Contract Vehicles	cp711_ctmcntveh_001.zip
Projects	Contract Management	CTMDOCTP	Manage Document Types	cp711_ctmdoctp_001.zip

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMNAICS	Manage NAICS Codes	cp711_ctmnaics_001.zip
Projects	Contract Management	CTMAGRTYPE	Manage Agreement Types	cp711_ctmagrtype_001.zip
Projects	Contract Management	CTMCNTDT	Manage Contract Date Types	cp711_ctmcntdt_001.zip
Projects	Contract Management	CTMCNTST	Manage Contract Status	cp711_ctmcntst_001.zip
Projects	Contract Management	CTMCNTYPE	Manage Contract Types	cp711_ctmcntype_001.zip
Projects	Contract Management	CTMDFAR	Manage DFAR Library	cp711_ctmdfar_001.zip
Projects	Contract Management	CTMFAR	Manage FAR Library	cp711_ctmfar_001.zip
Projects	Contract Management	CTMGSA	Manage GSA Schedule Codes	cp711_ctmgsa_001.zip
Projects	Contract Management	CTMVENDRT	Manage Supplier Vendor Rating Codes	cp711_ctmvendrt_001.zip
Projects	Contract Management	CTMVENDDC	Manage Supplier Vendor Rating Descriptions	cp711_ctmvenddc_001.zip
Projects	Contract Management	CTMCNLAB	Manage Contract User-Defined Labels	cp711_ctmcnlab_001.zip
Projects	Contract Management	CTMSBLAB	Manage Subcontract User-Defined Labels	cp711_ctmsblab_001.zip
Projects	Contract Management	CTMOCIRV	Manage OCI Reviewer	cp711_ctmocirv_001.zip
Projects	Contract Management	CTMOCIST	Manage OCI Status	cp711_ctmocist_001.zip
Projects	Contract Management	CTMOCLAB	Manage OCI User-Defined Labels	cp711_ctmoclab_001.zip
Projects	Contract Management	CTMOPSET	Configure Opportunity Settings	cp711_ctmopset_001.zip
Projects	Contract Management	CTMOPPB	Manage Opportunity Business Units	cp711_ctmoppbu_001.zip

Domain	Module	Application ID	Application Name	Application File
Projects	Contract Management	CTMCLSRs	Manage Opportunity Closed Reasons	cp711_ctmclsrs_001.zip
Projects	Contract Management	CTMRESP	Manage Opportunity Company Responsibilities	cp711_ctmresp_001.zip
Projects	Contract Management	CTMCTTYP	Manage Opportunity Contract Types	cp711_ctmcttyp_001.zip
Projects	Contract Management	CTMLOSS	Manage Opportunity Loss Reasons	cp711_ctmloss_001.zip
Projects	Contract Management	CTMSOURC	Manage Opportunity Sources	cp711_ctmsourc_001.zip
Projects	Contract Management	CTMSTAGE	Manage Opportunity Stages	cp711_ctmstage_001.zip
Projects	Contract Management	CTMOTYPE	Manage Opportunity Types	cp711_ctmotype_001.zip
Projects	Contract Management	CTMPROB	Manage Opportunity Win/Bid Probabilities	cp711_ctmprob_001.zip
Projects	Contract Management	CTMOPLAB	Manage Opportunity User-Defined Labels	cp711_ctmoplab_001.zip
Projects	Project Setup	PJMSETNG	Configure Project Settings	cp711_pjmsetng_009.zip
Projects	Project Setup	PJMMOD	Manage Modifications	cp711_pjmmod_003.zip
Projects	Project Setup	PJMBASIC	Manage Project User Flow	cp711_pjmbasic_023.zip
Projects	Project Setup	PJPPREP	Import Project Master Data	cp711_pjpprep_020.zip
Projects	Project Setup	PJPMADD	Mass Add Project Master Data	cp711_pjpmadd_007.zip
Projects	Project Inquiry and Reporting	PJRPROJ	Print Project Status Report	cp711_pjrproj_015.zip
Accounting	Accounts Receivable	ARMCUST	Manage Customers	cp711_armcust_003.zip
Accounting	Accounts Payable	APMSCSET	Manage Security Clearance Settings	cp711_apmscset_003.zip

Domain	Module	Application ID	Application Name	Application File
Accounting	Accounts payable	APMCLRCD	Manage SCI/SAP Clearance Codes	cp711_apmclrcd_003.zip
Accounting	Accounts payable	APMVEND	Manage Vendors	cp711_apmvend_006.zip
Accounting	Accounts Payable	AOPUTLVU	Import Vendors	cp711_aoputlvu_014.zip
Accounting	Accounts Payable	APMVEMPL	Manage Vendor Employees	cp711_apmvempl_003.zip
Accounting	Accounts Payable	APPUTLVE	Import Vendor Employees	cp711_apputlve_009.zip
People	Employee	EMMUSITAR	Manage Employee Security	cp711_emmusitar_002.zip
Administration	System Administration	SY PSTNG	Rebuild Global Settings	cp711_sypstng_002.zip
Administration	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_017.zip

People

Import Timesheets with Transaction ID Values

The Import Timesheets screen now has the ability to import the Transaction ID (TRANS_ID) values and populate the **Transaction ID** fields of manufacturing order timesheet lines in Costpoint. This functionality is available when importing files using comma-separated values (CSV) file format.

In line with this enhancement, the **Transaction ID** field was added to the CSV file layout for manufacturing order timesheet lines. Details are as follows:

#	Field Name	Costpoint Table	Data Type and Size	Required/Optional
36	Transaction ID	TS_LN.TRANS_ID	Numeric 8	Optional

Patch and System JAR Requirements

This enhancement requires the following Costpoint 7.1.1 releases:

- PATCH3333
- PATCH3332
- Common lib - TSIMPORT (cp711_cmplib_TSIMPORT_004.zip)

Limited Purpose FSA (Flexible Spending Account) Setting in Employee Self Service

The Configure Self Service screen now provides you the option to display the **Limited Purpose FSA** check box on Medical FSA screens for life events and benefits enrollment. **Limited Purpose FSA** check boxes allow you to designate an FSA as limited purpose only which will only reimburse vision and dental expenses.



This enhancement is required for an upcoming Costpoint feature for supporting Evidence of Insurability (EOI). The updates in this release will only function when the rest of the enhancements for the EOI feature are released in 2018

This particular Costpoint release updates the following screens with the corresponding changes:

Configure Self Service Settings (ESMESS)

A new check box, **Show 'Limited Purpose' checkbox**, allows you to display the check boxes for designating a limited purpose FSA on Medical FSA screens.

Set Up Company (SYPCOMP)

The following new fields were added to tables for company defaults:

- Days that employees are considered new employees (DAYS_NEW)
- Show 'Limited Purpose' flag in Medical FSA (SHOW_LIMIT_FSA_FL)

Patch and System JAR Requirements

This enhancement requires Costpoint 7.1.1 System JAR 036 and PATCH3335.

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application File
Administration	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_017.zip
People	Employee Self Service	ESMESS	Configure Self Service Settings	cp711_esmess_006.zip

Override Tax ID in the Company Identification in ACH Bank File

This enhancement accommodates the ACH bank file issue of Companies with subsidiaries that are under one taxable entity. Companies with this setup can use this enhancement if they want to distinguish the bank files for the main company's direct deposit and each of the subsidiaries direct deposit.

For this purpose, the Create ACH Bank File screen now allows you to override the Taxable Entity's tax ID and enter a value for Company Identification. The Create ACH Bank File screen contains the following new check box and field:

- **Override Tax ID in the Company Identification Field (Record) 5** — Select this check box to substitute the Tax ID in Record 5 with the specified Company Identification.

- **Company Identification** — Enter the Company Identification for Position 41 - 50 in the Company/Batch Header Record

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application File
People	Payroll	PRPBANK	Create ACH Bank File	cp711_prpbank_004.zip

Regulatory and Compliance

2017 Calendar Year End (CYE) Regulatory Part 1

These Deltek Costpoint Regulatory Release Notes for Quarter 4 2017 provide information for calendar year end (CYE).



The Costpoint 7.1.1 CYE 2017 Regulatory Updates will be deployed in **two parts**. Please expect the second part of the CYE 2017 Regulatory update to be available for download on December 29, 2017.

Important Announcements

Versions 7.0.1 and 7.1.1 – Calendar Year End 2018

In an effort to allow adequate time to prepare for future year-end system jar requirements, please be aware that you must have the following System JARs loaded before the Calendar Year End 2018 release which is scheduled for December 2018. ***Appropriate action should be taken throughout the next 15 months to plan for this System JAR requirement.***

Anticipated Calendar Year End 2018 System JAR Requirements

- Costpoint 7.0.1: System JAR 049 (released April 2017)
- Costpoint 7.1.1: System JAR 028 (released April 2017)

Both System JARs introduced a much needed change to the State Filing Statuses in Costpoint. Rather than using filing statuses that only applied to Costpoint (Both, Miscellaneous 1, Miscellaneous 2, etc.) and had to be manually mapped to each state's actual filing statuses, Costpoint 7.0.1 and 7.1.1 have been updated to use each state's actual filing status(es). Though the new filing statuses were introduced in April 2017, Deltek will continue to support tax table updates based on the original state filing statuses for the remaining 2017 tax update and for 2018 tax updates. Any tax updates for 2019 will only support the new state filing statuses that were introduced in System JAR 049 for 7.0.1 and System JAR 028 for 7.1.1 (both released in April 2017).

Version 7.1.1 – Further Reductions in the Need to Release Regulatory Updates within System JARs

We are happy to announce that we have made several programming changes within the past year to limit the need for regulatory changes to be released via System JAR. System JAR 028 for Costpoint 7.1.1 was part of that effort.

The coding changes introduced in System JAR 028 for Costpoint 7.1.1 allowed us to disassociate payroll computation coding changes from future 7.1.1 System JAR releases. So, after System

JAR 028, changes to Costpoint version 7.1.1's Compute Payroll application will not require deployment via System JAR as they did in the past. This not only means that we can deploy Costpoint 7.1.1 regulatory updates and fixes more quickly, but it will also help us keep the System JAR requirements for Calendar Year End releases as minimal as possible.

The changes we made with the noted System JARs will greatly help with that effort to minimize the System JAR requirements for future regulatory releases.

Installation Prerequisites

Ensure the following are installed and operational:

- Costpoint Version 7.1.1
- Required Costpoint 7.1.1 System JAR:
 - **System JAR 024 (cp711_sys_024.zip)** — For clients **with** Puerto Rico Employees between ages 16 and 26
 - **System JAR 009 (cp711_sys_009.zip)** — For clients **without** Puerto Rico Employees between ages 16 and 26
- Costpoint 7.1.1 Patches:
 - PATCH3307
 - PATCH3309
 - PATCH3331
 - PATCH3355

Custom Programs



If your Costpoint system is customized, do **NOT** install this update without first contacting your Account Manager at 1.800.456.2009. Custom work must be upgraded to be compatible with each new release. Deltek does customization on a request-only basis. Depending on the scope of the upgrade and current work backlogs, modifications may not be available for 60 to 90 days. If you do not have a specific Ongoing Support Plan for your custom work, there is a charge for the upgrade programming.

Updates and Enhancements

This section includes:

- Federal updates
- State updates

Federal Tax Updates

The following are updates to Federal taxes:

- Social Security Limit: \$128,400
- 401(k) Deferral Limit: \$18,500
- 401(k) Wage Limit: \$275,000
- Exemption Amount: \$4,150

For more information, please see: <https://www.irs.gov/pub/irs-drop/n-17-64.pdf>

Federal and State Electronic Filing (EFW2)

A new box 12 Code FF money field, **Permitted Benefits Under a Qualified Small Employer Health Reimbursement Arrangement** (Code FF), was added to the following records:

- RW Employee Record in positions **474 - 484**
- RT Total Record in positions **400 - 414**

For more information, see: Social Security Administration Publication No. 42-007:
<http://www.socialsecurity.gov/employer/efw/16efw2.pdf#zoom=100>.



For Tax Year 2017, **AccuWage Online** is available to test your EFW2/EFW2C wage files. **AccuWage Download** is no longer available. Log into Business Services Online (BSO) to access **AccuWage Online**.

FUTA Credit Reduction

The following table provides the corresponding 2017 FUYA Credit Reduction percentage for each state:

State	2017 FUTA Credit Reduction
California	2.1%
Virgin Islands	2.1%

W2 Form and USERRA make-up amounts for 2016

A new box 12 code **FF** has been added to report the total amount of permitted benefits under a qualified small employer health reimbursement arrangement (QSEHRA). Costpoint now supports this update.

Costpoint now has the ability to report USERRA make-up amounts for 2016. On the Manage W-2s screen, the Box 12 subtask now contains the additional Lookup codes for USERRA 2016.

State Electronic Filing

The following is a list of states using standard EFW2 format:

- | | |
|-------------------------|--------------------|
| 1. Arkansas | 16. Massachusetts |
| 2. Arizona | 17. Michigan |
| 3. Colorado | 18. Minnesota |
| 4. Connecticut | 19. Missouri |
| 5. District of Columbia | 20. Mississippi |
| 6. Delaware | 21. Montana |
| 7. Georgia | 22. North Carolina |
| 8. Idaho | 23. North Dakota |
| 9. Illinois | 24. Nebraska |
| 10. Indiana | 25. New Jersey |
| 11. Kansas | 26. New Mexico |
| 12. Kentucky | 27. Ohio |
| 13. Louisiana | 28. Oregon |
| 14. Maryland | 29. Pennsylvania |
| 15. Maine | 30. Puerto Rico |

31. Rhode Island
32. South Carolina
33. Utah
34. Virginia

35. Vermont
36. Wisconsin
37. West Virginia

Missouri W-2 Electronic Filing

The following W-2 electronic filing updates apply to the state of Missouri:

- The RS format was updated. This record contains several fields that are now required. Date and time stamp were added to this record.
- The RV record is now required with custom format. This record contains several fields that are now required. Date and time stamp was added to this record.
- The RA, RW, and RT Records are now required.
- Submission Date is a required field.
- The Create State W-2 File screen now contains the following new fields for third party payer information of Missouri:
 - Third Party Payer FEIN
 - Third Party Payer Name
 - Third Party Payer Amount

State Tax Updates

The following are state tax changes effective January 1, 2018

Arkansas

The unemployment-taxable wage base decreases from \$12,000 to **\$10,000**.

California

- The California's 2018 withholding instructions and tables for Method B were revised.
- The standard deduction increases from \$4,129 to \$4,236. The 2018 income brackets also were revised from 2017.

Colorado

The unemployment-taxable wage base increases from \$12,500 to **\$12,600**.

Delaware

The unemployment-taxable wage base decreases from \$18,500 to **\$16,500**.

Idaho

The unemployment-taxable wage base increases from \$37,800 to **\$38,200**.

Iowa

The unemployment insurance taxable wage base increased from \$29,300 to **\$29,900**.

Maine

- The annual personal exemption increases from \$4,050 to **\$4,150**.
- The State Standard Deduction was updated.
- The Withholding table was updated.

Maryland

The tax rate in Cecil County increases from 2.80 percent to 3 percent.

Minnesota

- The withholding allowance increases from \$4,050 to **\$4,150**.
- The wage bracket thresholds for single and married employees also were adjusted.

Missouri

The unemployment-taxable wage base decreases from \$13,000 to **\$12,500**.

Montana

The unemployment-taxable wage base increases from \$31,400 to **\$32,000**.

Nevada

The unemployment-taxable wage base increases from \$29,500 to **\$30,500**.

New Mexico

The unemployment-taxable wage base decreases from \$24,300 to **\$24,200**.

North Carolina

The unemployment-taxable wage base increases from \$23,100 to **\$23,500**.

Oklahoma

The unemployment-taxable wage base decreases from \$17,700 to **\$17,600**.

Oregon

The unemployment-taxable wage base increases from \$38,400 to **\$39,300**.

Pennsylvania

The unemployment-taxable wage base increases from \$9,750 to **\$10,000**.

South Carolina

- Standard deduction maximum amount for one or more exemption increases from \$2,860 to **\$3,150**.
- Personal exemption amount for one increases from 2,370 to **\$2,440**.
- The withholding table was updated.

Utah

The unemployment-taxable wage base increases from \$33,100 to **\$34,300**.

Vermont

The unemployment-taxable wage base increases from \$17,300 to **\$17,600**.

Washington

The unemployment-taxable wage base increases from \$45,000 to **\$47,300**.

2017 Calendar Year End (CYE) Regulatory Part 2

These Deltak Costpoint Regulatory Release Notes for Quarter 4 2017 provide information for calendar year end (CYE).



The Costpoint 7.1.1 CYE 2017 Regulatory Updates will be deployed in **two parts**. The first part of the CYE 2017 Regulatory update is available for download with the release name: **Costpoint 7.1.1 CYE 2017 Regulatory Updates (Part 1 of 2)**.

Important Announcements

2017 Affordable Care Act (ACA)

The XML and form updates for 2017 ACA forms are **not** included in this release. The 2017 ACA update will be available for download in a separate release on DSM.

Versions 7.0.1 and 7.1.1 – Calendar Year End 2018

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- Costpoint Version 7.1.1
- Required Costpoint 7.1.1 System JAR:
 - **System JAR 024 (cp711_sys_024.zip)** — For clients **with** Puerto Rico Employees between ages 16 and 26

- **System JAR 009 (cp711_sys_009.zip)** — For clients **without** Puerto Rico Employees between ages 16 and 26
- Costpoint 7.1.1 Patches:
 - PATCH3359
 - PATCH3364

Custom Programs



If your Costpoint system is customized, do **NOT** install this update without first contacting your Account Manager at 1.800.456.2009. Custom work must be upgraded to be compatible with each new release. Deltek does customization on a request-only basis. Depending on the scope of the upgrade and current work backlogs, modifications may not be available for 60 to 90 days. If you do not have a specific Ongoing Support Plan for your custom work, there is a charge for the upgrade programming.

Updates and Enhancements

State Updates

Michigan W-2 Electronic Filing

- The following fields for the city of Detroit withholding information was added to the Code RS State Record for 2017.

Location	RS Field	Specification
298 – 304	Fill with Blanks	Blanks
305 – 307	City of Detroit Code	'170'
308	Tax Type Code	'C'
309 – 319	City Taxable Wages	City of Detroit taxable wages amount
320 – 330	City Tax Withheld	City of Detroit tax withheld amount
331 – 512	Blank	Blanks

- The **City/County/School/PSD Code** field on the Manage Local Taxes screen is now available for the state of Michigan.



If you create Michigan W-2 files that include City of Detroit withholding information, you must setup the Locality on Manage Local Taxes screen where **City/County/School/PSD Code value is 170**.

- The following RS Record locations were set to blanks for 2017:
 - 5-9
 - 69-72
 - 150-247
 - 268-275

North Carolina W-2 Electronic Filing

The eNC3 W2 Format will be used for W-2 electronic filing beginning January 1, 2018. The DP-43 format is no longer valid for submissions made on or after January 1, 2018. For compliance with this state requirement, Costpoint now follows the eNC3 W2 Format.

For more information please refer to: <https://www.dornco.com/electronic/enc3/w2.pdf>

State Tax Updates

The following are state tax changes effective January 1, 2018:

Alaska

The unemployment-taxable wage base decreases from \$39,800 to **\$39,500**.

District of Columbia

The **One** withholding allowance increased from \$1,775 to **\$4,150**.

Hawaii

The unemployment-taxable wage base increases from \$44,000 to **\$45,900**.

Illinois

The standard exemption decreases from \$2,175 to **\$2,000**.

Kentucky

The standard deduction is to increase from \$2,480 to **\$2,530**.

New York

The annual withholding tax tables for Married and Single have been updated.

North Dakota

The unemployment-taxable wage base increases from \$35,100 to **\$35,500**.

Rhode Island

- The unemployment taxable wage base increases from \$22,400 to **\$23,000**.
- The annual withholding table for all filing status types was updated.
- The threshold for 0.00 allowance amount increases from \$217,350.00 to **\$221,800.00**.

Tennessee

The unemployment-taxable wage base decreases from \$8,000 to **\$7,000**.

Known Issues

Application Processing Not Completed

Description: When you run certain Costpoint processing applications, such as the Create State W-2 File or the Close Payroll Year, the progress dialog box does not indicate that the process is complete even though it has completed. This issue has been addressed in the **Costpoint 7.1.1 System JAR 036** release.

Customers Impacted: This defect affects Costpoint 7.1.1 users.

Workaround Before Fix: Close the entire browser and log in to Costpoint again.

Additional Notes: Aside from the applications mentioned, this issue may occur in other process applications.

Full 2017 Tax Table Update for All Maryland Counties

This release provides all of Maryland state tax table updates for all counties for payroll year 2017. With this update, Maryland users will be able to compute payroll for a 2017 pay period in 2018. This update affects you if you installed **Feature 613963: State Withholding Filing Status Update**.

Patch Requirements

The enhancements in this release require Costpoint 7.1.1 PATCH3344.

Materials Management

Standard Costing

This feature enables you to use standard costing methods for inventory valuation. Prior to this feature, only average actual costing method is available in Costpoint.



This enhancement has no impact on current functionality.

The functionalities of this updates/enhancements are not available until the full feature is released.

Standard costing enhancement features the following:

- New secure standard costing tables for item standard cost and project item standard cost
- New application to calculate future standard costs
- New application for purchase price variance (PPV)
- Ability to calculate and post variances for PPV and manufacturing costs (materials, labor, misc 1, misc 2, subcontractor) and corresponding overheads
- Ability to update item preprocessor for new cost tables
- Modified WIP variance process to include breakdowns for average actual and standard costing

This update requires PATCH3170

Administration

View Help About (SYMABOUT)

The Standard Costing feature has been registered in the View Help About (SYMABOUT) screen.

Limited Purpose FSA (Flexible Spending Account) Setting in Employee Self Service

The Configure Self Service Screen now provides you the option to display the **Limited Purpose FSA** check box on Medical FSA screens for life events and benefits enrollment. **Limited Purpose FSA** check boxes allow you to designate an FSA as limited purpose only which will only reimburse vision and dental expenses.



This enhancement is required for an upcoming Costpoint feature for supporting Evidence of Insurability (EOI). The updates in this release will only function when the rest of the enhancements for the EOI feature are released in 2018.

The particular Costpoint release updates the following screens with the corresponding changes:

Configure Self Service Settings (ESMESS)

A new check box, **Show Limited 'Purpose' checkbox**, allows you to display the check boxes for designating a limited purpose FSA on Medical FSA screens.

Set Up Company (SYPCOMP)

The following new fields were added to tables for company defaults:

- Days that employees are considered new employees (DAYS_NEW)
- Show 'Limited Purpose' flag in Medical FSA (SHOW_LIMIT_FSA_FL)

Patch and System JAR Requirements

This enhancement requires Costpoint 7.1.1 System JAR 036 and PATCH3335.

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application File
Administration	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_017.zip
People	Employee Self Service	ESMESS	Configure Self Service Settings	cp711_esmess_006.zip

Reports & Analytics

Role-Based Dashboards: Usability Enhancements for the Aging Dashparts

Role-based dashboards available in Costpoint are continuously being updated to improve usability and the overall look of the dashboards.

In this release, the enhancements are mainly focused on the aging dashparts of the Project Manager Dashboard, Organization Manager Dashboard, and Finance Manager Dashboard. One of the changes is the splitting of these dashparts into Aging and Current dashparts:

- **AR Aging** — This is now separated into AR Aging and AR Current dashparts. These dashparts display on all three dashboards.
- **Aged Open Billing Detail** — This is now separated into Aged Open Billing Detail and Current Open Billing Detail dashparts. These dashparts display on all three dashboards.
- **AP Aging** — This is now separated into AP Aging and AP Current dashparts. These dashparts display only on the Finance Manager Dashboard.

On the Reports tab, the Current chart displays data for the 0-30 days aging range, while the Aging chart displays data for the other aging buckets (31-60, 61-90, 91-120, and 120+ days). The change was made to resolve the issue of having the Current bucket visually dominating the chart. You can now view your data in all aging buckets more accurately.

There are no changes on the parameters that define the dashparts (that is, the parameter fields on the Parameters tab are the same for the Aging and Current dashparts).

The other cosmetic enhancements applied to the AR, Open Billing Detail, and AP charts include the following:

- “Data Updates Realtime” displays on the charts to indicate that the charts reflect updates to accounts payable (AP) transactions, accounts receivable (AR) invoices and receipts, or billed transactions as they are posted in Costpoint.
- The charts display the X and Y axis titles. Previously, the Y axis displayed just the vendor/project name label, while the X axis displayed the amount without the currency. Now, the Y axis displays either “Vendors” or “Projects” as the axis title, and the X axis displays “US Dollars” along with (000) to reflect that the data is presented in thousands.

System JAR Requirement

These enhancements require Costpoint 7.1.1 System JAR 036 (cp711_sys_036.zip)

Application JAR Requirements

Domain	Module	Application ID	Application Name	Application File
Reports & Analytics	Dashboards	PJDPM	Project Manager Dashboard	cp711_pjdpm_003.zip
Reports & Analytics	Dashboards	PJDOM	Organization Manager Dashboard	cp711_pjdom_002.zip
Reports & Analytics	Dashboards	DBDFM	Finance Manager Dashboard	cp711_dbdfm_002.zip

Known Issues

Drill-Through Application Not Automatically Loading the Result Set

On the Labor Utilization dashpart of the Organization Manager Dashboard, clicking an employee ID link brings up the Utilization Analysis (COL1,BOL1,POL1) screen. This screen, however, does not automatically load the result set for the selected employee ID link. To display the utilization analysis information on this screen, you must click the Execute icon on the toolbar or press F3.

Incorrect Y Axis Title on AP Charts

On the AP Current and AP Aging charts, “Vendors” is incorrectly displayed as “Projects” on the Y axis. Note, however, that the vendor names are correctly displayed.

Parameters and Reports Tabs Missing on Navigation Toolbar

When accessing a dashboard with another dashboard already opened, the Parameters and Reports tabs may not display on the navigation toolbar when you get back to the previously opened dashboard. Click the Refresh icon to display the tabs again.

Viewing the Online Help

If you use Internet Explorer and the online help does not display correctly, you need to turn off Compatibility View for the browser. Click **Tools » Compatibility View settings**, and clear the

Display intranet sites in Compatibility View check box. Then refresh the browser. Make sure you remove deltek.com (if listed) from the Websites you have added to Compatibility View list.

Budgeting and Planning

There are no changes to Deltek Budgeting and Planning for this release.

Time & Expense

Time

Printing Leave Reports Enabled for Managers

Managers and Supervisors can now print leave reports from the Manage Approve Timesheets application.

Expense

Default Attachment Type Added

The attachment type now displays by default in the **Attachment Type** field if only one type is available.

Required Fields Signified by Red Asterisk

Required fields in the Manage Expense Report and Manage Expense Authorization screens are denoted with a red asterisk [*]. Failure to complete these fields results in an error message.

Configuration

Set Default Application

A **Default Application ID** field was added to **Configuration » Resources » Manage Preferences** that enables users to select a default application that will display when they log onto Time and Expense.

Additionally, an **Application Name** field was added that displays the name of the default application you select.



The **Default Application ID** and **Application Name** fields were also added to **Admin » Security » System Security » Manage Users**. Time and Expense administrators can use these fields to select the application that will automatically display when users log onto Time and Expense.



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