# Deltek

# Deltek Costpoint® 7.1.7
# Update 02

## Release Notes

**October 23, 2020**

# Contents

# Overview

Welcome to Deltek Costpoint 7.1.7 Update 02 Release Notes (Build 7.1.7.1022). These release notes contain a summary of the following:

- Enhancements
- Software Issues Resolved

These release notes address all of the modules associated with this update of Deltek Costpoint 7.1.7, some of which your firm may not use. Skip the sections that do not apply to your implementation of Deltek Costpoint.

## New Release Notes Format

Beginning with Costpoint 7.1.2, Costpoint Release Notes are delivered in HTML format and can be viewed at this link: https://help.deltek.com/product/Costpoint/7.1/ReleaseNotes/. This web page contains links to the Release Notes for each release version as well as links to the Costpoint online help, Costpoint Information Center (CIC), and Costpoint Cloud Information Center (CCIC).

We will continue to provide PDFs for the next few releases as we transition to the new format.

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

## Installation Notes

The MR installer reads through all Costpoint systems selected. If a Time & Expense (TE) segment is found, it searches for the presence of a Time & Expense license for that Costpoint system. It provides a listing of all such systems found, prompting you to review the list and remove (using DBWizard, Remove License) any TE license from the Costpoint system where the connected TE segment is for a standalone, external connection that should not have had a Time & Expense license applied to it.

Any external Time & Expense segments found where a Time & Expense license is not present, or where the Time & Expense segment is for a Time & Expense 901 system, the MR Time & Expense patches, SPs, or Data Dictionary files will not be applied.

If all systems listed are properly licensed for Time & Expense and you do want the MR applied to them, please proceed. If you are unsure, please contact Deltek Technical Support.

# Enhancements

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

## Regulatory Enhancements

### Federal

#### 2021 Form W-4 Updates

This Costpoint release updates several screens to reflect the changes in the Deductions Worksheet of the 2021 Form W-4.

#### Manage Employee Taxes (PRMETAX)

> **Note:** The updates in this section also apply to the Taxes subtask of the Manage Employee Information screen.

The following are the changes to the screen:

- The field label changed from **Form W-4 Version** to **Form W-4**.
- The **2020** option in the **Form W-4** drop-down list was updated to **2020 or greater**.

#### Federal Withholding (ESMFEDWH)

The following are the changes to the screen:

- The "2020" text was removed from the labels of the tabs.
- The wording on the Deductions Worksheet section of the Multiple Jobs/Deductions Worksheet tab was updated to reflect the information on the latest Form W-4.
- Starting 01/01/2021, the 2019 W-4 subtask will no longer be available.

#### Life Events/New Hires (ESMLIFEEVENT)

The following are the changes to the screen:

- The "2020" text was removed from labels on the tabs for Federal Withholding.
- The wording on the Deductions Worksheet tab for Federal Withholding was updated to reflect the information on the latest Form W-4.

#### Manage Payroll Records (PRMPTF)

The **2020** option in the **Form W-4 Version** field was updated to **2020 or greater**.

#### Manage Employee Earnings History (PRMERF)

The **2020** option in the **Form W-4 Version** drop-down list was updated to **2020 or greater**.

#### View Payroll Edit Table (PRQPTF)

The **2020** option in the **Form W-4 Version** field was updated to **2020 or greater**.

### View Employee Earnings (PRQERF)

The **2020** option in the **Form W-4 Version** field was updated to **2020 or greater**.

### View Employee Taxes (PRQETAX)

The **2020** option in the **Form W-4 Version** field was updated to **2020 or greater**.

## Allow Truncation of Social Security Numbers on Printed W-2

The IRS finalized regulations to allow employers to voluntarily truncate employee social security numbers (SSNs) on copies of Forms W-2, Wage and Tax Statement, which are furnished to employees after December 31, 2020 [84 F.R. 31717, 7-3-19].

The regulations allow employers to voluntarily mask SSNs so that the numbers display in the form of IRS truncated taxpayer identification numbers (TTINs), which display only the last four digits of a taxpayer identification number (TIN) and use X's or asterisks for the first five digits (for example, XXX-XX-1234 or ***-**-1234).

The final regulations permit employers to truncate employees' SSNs to appear in the form of a TTIN on copies of Forms W-2 that are furnished to employees under IRC §6051 (copies B, C, and 2). The truncation of SSNs on employee copies of Form W-2 will not be required. The decision is entirely up to the employer.

The final regulations clarify that employers may not truncate an employee's SSN to appear in the form of a TTIN on copy A of a Form W-2 filed with the Social Security Administration (SSA). Both the IRS and SSA need the full SSN on Forms W-2 to identify individuals. The IRS receives the full SSN when SSA sends the employer's W-2 file to IRS once it has finished processing the file.

This Costpoint release provides you with the option to truncate the employees' SSNs on the employee copies of the printed W-2. Use the following new field on the Print W-2s screen for this functionality:

| Field | Description |
|---|---|
| **Print only the last 4 numbers of SSN** | Select this check box to display only the last 4 numbers of the employee's social security number (SSN) on the W-2. When you select this check box, the copies of the W-2 that are furnished to employees (copies B, C, and 2) display only the last 4 numbers of the employee's SSN. An "X" will print instead of the other numbers. For example, XXX-XX-1234. |

# State

## 2020 New Jersey Tax Withholding

New legislation enacted September 29, 2020, made several changes to the New Jersey Gross Income Tax Act as part of New Jersey's Fiscal Year 2021 budget. The new law increases the Gross Income Tax rate for income between $1 million and $5 million and provides a new withholding rate for the remainder of 2020.

Effective January 1, 2020, the tax rate on that income bracket increases from 8.97% to 10.75%, regardless of filing status.

Effective immediately, employers must withhold Income Tax at the rate of 21.3% from salaries, wages and other remuneration in excess of $1 million, but not in excess of $5 million, during the taxable year. This higher withholding rate allows taxpayers affected by the rate increase to "catch up" on their withholdings for the year since the new tax rate is retroactive to January 1, 2020.

The Division of Taxation will not impose interest or penalties for insufficient payment of estimated tax and/or withholdings that may be due before September 29, 2020, if the underpayment is a result of the new tax rate.

The following rates published by New Jersey represented withholdings for a full tax year and do not reflect the "catch up" rate of 21.3%.

### RATE A

**ANNUAL PAYROLL PERIOD (Allowance $1,000)**

If the amount of taxable wages is:

The amount of income tax to be withheld is:

| Over | But Not Over | | | Of Excess Over |
|---|---|---|---|---|
| $ 0 | $ 20,000 | | 1.5% | $ 0 |
| $ 20,000 | $ 35,000 | $ 300.00 + | 2.0% | $ 20,000 |
| $ 35,000 | $ 40,000 | $ 600.00+ | 3.9% | $ 35,000 |
| $ 40,000 | $ 75,000 | $ 795.00 + | 6.1% | $ 40,000 |
| $ 75,000 | $ 500,000 | $ 2,930.00 + | 7.0% | $ 75,000 |
| $ 500,000 | $ 1,000,000 | $ 32,680.00 + | 9.9% | $ 500,000 |
| $ 1,000,000 | over | $ 82,180.00 + | 11.8% | $ 1,000,000 |

### RATE B

**ANNUAL PAYROLL PERIOD (Allowance $1,000)**

If the amount of taxable wages is:

The amount of income tax to be withheld is:

| Over | But Not Over | | | Of Excess Over |
|---|---|---|---|---|
| $ 0 | $ 20,000 | | 1.5% | $ 0 |
| $ 20,000 | $ 50,000 | $ 300.00 + | 2.0% | $ 20,000 |
| $ 50,000 | $ 70,000 | $ 900.00 + | 2.7% | $ 50,000 |
| $ 70,000 | $ 80,000 | $ 1,440.00 + | 3.9% | $ 70,000 |
| $ 80,000 | $ 150,000 | $ 1,830.00 + | 6.1% | $ 80,000 |
| $ 150,000 | $ 500,000 | $ 6,100.00 + | 7.0% | $ 150,000 |
| $ 500,000 | $ 1,000,000 | $ 30,600.00 + | 9.9% | $ 500,000 |
| $ 1,000,000 | | $ 80,100.00 + | 11.8% | $ 1,000,000 |

## RATE C

### ANNUAL PAYROLL PERIOD (Allowance $1,000)

| If the amount of taxable wages is: | | The amount of income tax to be withheld is: | | |
|---|---|---|---|---|
| Over | But Not Over | | | Of Excess Over |
| $ 0 | $ 20,000 | | 1.5% | $ 0 |
| $ 20,000 | $ 40,000 | $ 300.00 + | 2.3% | $ 20,000 |
| $ 40,000 | $ 50,000 | $ 760.00 + | 2.8% | $ 40,000 |
| $ 50,000 | $ 60,000 | $ 1,040.00 + | 3.5% | $ 50,000 |
| $ 60,000 | $ 150,000 | $ 1,390.00 + | 5.6% | $ 60,000 |
| $ 150,000 | $ 500,000 | $ 6,430.00 + | 6.6% | $ 150,000 |
| $ 500,000 | $ 1,000,000 | $ 29,530.00 + | 9.9% | $ 500,000 |
| $ 1,000,000 | | $ 79,030.00 + | 11.8% | $ 1,000,000 |

## RATE D

### ANNUAL PAYROLL PERIOD (Allowance $1,000)

| If the amount of taxable wages is: | | The amount of income tax to be withheld is: | | |
|---|---|---|---|---|
| Over | But Not Over | | | Of Excess Over |
| $ 0 | $ 20,000 | | 1.5% | $ 0 |
| $ 20,000 | $ 40,000 | $ 300.00 + | 2.7% | $ 20,000 |
| $ 40,000 | $ 50,000 | $ 840.00 + | 3.4% | $ 40,000 |
| $ 50,000 | $ 60,000 | $ 1,180.00 + | 4.3% | $ 50,000 |
| $ 60,000 | $ 150,000 | $ 1,610.00 + | 5.6% | $ 60,000 |
| $ 150,000 | $ 500,000 | $ 6,650.00 + | 6.5% | $ 150,000 |
| $ 500,000 | $ 1,000,000 | $ 29,400.00 + | 9.9% | $ 500,000 |
| $ 1,000,000 | | $ 78,900.00 + | 11.8% | $ 1,000,000 |

## RATE E

**ANNUAL PAYROLL PERIOD (Allowance $1,000)**

| If the amount of taxable wages is: | | | The amount of income tax to be withheld is: | | | |
|---|---|---|---|---|---|---|
| **Over** | **But Not Over** | | | | **Of Excess Over** | |
| $          0 | $       20,000 | | | 1.5% | $          0 | |
| $      20,000 | $       35,000 | $     300.00 + | 2.0% | | $      20,000 | |
| $      35,000 | $     100,000 | $     600.00 + | 5.8% | | $      35,000 | |
| $    100,000 | $     500,000 | $  4,370.00 + | 6.5% | | $    100,000 | |
| $    500,000 | $  1,000,000 | $ 30,370.00 + | 9.9% | | $    500,000 | |
| $ 1,000,000 | | $ 79,870.00 + | 11.8% | | $ 1,000,000 | |

In order to comply with the mandated "catch-up" withholding, this Costpoint release updates New Jersey tax tables with the 21.3% "catch-up" tax rate for annualized taxable wages between 1,000,000 and 5,000,000 from September 29, 2020 through December 31, 2020. New tax tables with an effective date of January 1, 2021 will be also implemented to revert back to the 11.8% tax rate for those with annualized taxable wages greater than 1,000,000.

## 2021 SUTA Wage Base Updates

This Costpoint release adds tax table records effective 01/01/2021 for states where the unemployment-taxable wage base has been updated for tax year 2021.

> **Note:** These updates require PATCH3792, PATCH3796, PATCH3802, and PATCH3804.

### Iowa

The SUTA limit for 2021 is **$32,400**.

### Missouri

The SUTA limit for 2021 is **$11,000**.

### Montana

The SUTA limit for 2021 is **$35,300**.

### Nevada

The SUTA limit for 2021 is **$33,400**.

### New Jersey

The SUTA limit for 2021 is **$36,200**.

### Oklahoma

The SUTA limit for 2021 is **$24,000**.

## Washington

The SUTA limit for 2021 is **$56,500**.

## Wyoming

The SUTA limit for 2021 is **$27,300**.

# Installation

## MR Installer

### Important Information for Costpoint On-Premises Customers

For customers that have installed a Costpoint Maintenance Release (MR) for Costpoint version 7.1 or 8.0, Deltek has recently discovered the following issue and is encouraging all Costpoint customers to take corrective action immediately. The issue does not impact the functional or technical performance of Costpoint. Deltek Costpoint Cloud customers do not have to take any action.

### Issue

During the MR install process the following folder, "…\applications\enterprise\DEWebApp\WEB-INF", was inadvertently copied to the IIS Server if the machine where you run the MR installer has access to the IIS server and the IIS folder is registered in Configuration Utility. This above folder, "…\DEWebApp\WEB-INF", contains files that should not be present on the IIS server. This issue has been corrected starting with MR 7.1.10 and MR 8.0.2.

### Corrective Action

Please follow one of the steps below to correct this issue.

- Delete the folder, "...\DEWebApp\WEB-INF", and all file contents from the IIS server.
- Install MR 7.1.10 or MR 8.0.2 (subsequent MRs will also correct the issue). If the machine where you run the MR installer has access to IIS server and the IIS folder is registered in Configuration Utility, then the MR installer will delete this folder and file contents if it is present on the IIS server.

Please contact Deltek Customer Care with any questions.

# Software Issues Resolved

## Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was developed to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

## Materials

### Material Requirements Planning » Update Material Requirements Plan

**Defect 1364858**: Material Requirements Plan (MRP) transfers were not consistent with the plan substitute part selection. As a workaround, use a substitute planning order other than the original part across projects.

**Defect 1364859**: The **Create Transfer Reservation Action Message** check box on the Configure Materials Requirements Planning Settings screen affected how supply was netted within the project planning group when **Plan Substitute Part** was not selected on the same screen.

**Defect 1364860**: Material Requirements Planning (MRP) randomly assigned purchase order (PO) lines with the same Part/Rev, Due Date, and Inventory Abbreviation to a demand.

**Defect 1364861**: When you did not use Substitute Part Planning, Costpoint should have used inventory in-demand abbreviation before creating a transfer message from other inventory abbreviations/projects within the project planning group. This should happen even if the other projects' inventory was not in excess, and had their own demand due at a later date.

**Defect 1364876**: When you ran the Material Requirements Planning (MRP) process, and you used the Shop Floor calendar, the **Need Date** for the planned order was incorrect. To fix this error, the MRP logic has been updated to ensure that the **Need Date** will not be null when the Shop Floor calendar is in use.

## People

### Employee » Manage Employee Taxes

**Defect 1349957**: When you changed the **Withholding State - Filing Status** field value on an existing record with **VI** (Virgin Islands) as the withholding state, the screen did not update the value of the **Federal - Filling Status** field to **Exempt**.

As a workaround, you can clear the value in the **State** field in the **Withholding State** group box, and then re-enter **VI** in the field.

**Defect 1351633**: When you changed the **Withholding State - Filing Status** field value on an existing record with **GU** (Guam) as the withholding state, the screen did not update the value of the **Federal - Filling Status** field to **Exempt**.

As a workaround, you can clear the value in the **State** field in the **Withholding State** group box, and then re-enter **GU** in the field.

## Payroll » Print Paychecks

**Defect 1367525**: The application did not assign a check number to an employee with zero net pay. The application did not print the check even if you selected **Print Checks with Zero Net Pay**.

**Defect 1367533**: The application rolled up same pay types with the same entered hours into one hourly rate line even if the pay types had different hourly rates.

**Defect 1368670**: After you printed paychecks, the check number did not display on the Manage Payroll Records screen.

## Payroll » Print Payment Advices

**Defect 1367524**: The application did not assign an advice number to an employee with zero net pay. The application did not print the advice even if you selected **Print Advices with Zero Net Pay**.

**Defect 1367527**: The application rolled up same pay types with the same entered hours into one hourly rate line even if the pay types had different hourly rates.

**Defect 1368613**: The application did not sort deductions based on deduction codes.

**Defect 1368615**: After you printed payment advices, the advice number did not display on the Manage Payroll Records screen.

# Planning

## Organization Budgeting » Organization Budgets / Outlooks

**Defect 1356479**: The Rates Post tag in the **Modified By** column was overwritten when you used the Post Forward Rates to Budget application. To correct this, the Rates Post tag now displays in the new **Created By** column.

**Defect 1364991**: The application doubled holiday data, which affected rate and revenue projections.

**Defect 1364992**: When you updated the Escalation tab, an error occurred in Organizational Outlooks. As a result, when employees changed home orgs, duplicates occurred in multiple org budgets, causing merge errors.

## Organization Budgeting » Transaction Analysis (COT1)

**Defect 1356454**: When you printed the Transaction Analysis, the labor amount was not displayed when the **Labor Not Suppressed** option was selected.

## Project Budgeting » Project Budgets / EACs

**Defect 1342597**: T&M Revenue did not calculate on EAC for ETB formula types.

**Defect 1346311**: The Project Labor Categories subtask erroneously included the Current Bill Rate column. It was removed.

## Project Budgeting » T&M Labor Analysis (CPA10,BPA10,PPA10)

**Defect 1346310**: When you budgeted by period and a subperiod rate changed during that period, Costpoint Planning used the average rate when calculating revenue.

This was corrected as follows: When a project labor code (PLC) rate changes during a period and hours are budgeted by period, the latest PLC rate is now used when calculating revenue for the period.

## Project Budgeting » Transaction Analysis (CPA5)

**Defect 1356458**: When you printed the Transaction Analysis, the labor amount was not displayed when the **Labor Not Suppressed** option was selected.

# Projects

## Project Setup » Manage Alternate Projects

**Defect 1351332**: Querying a project report name was taking too long.

# Appendix: For Additional Information

## Deltek Support Center

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

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

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

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

## Access Deltek Support Center

**To access the Deltek Support Center:**

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

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

# About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com

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