Deltek Costpoint® 8.0.7

Release Notes

May 27, 2021

Contents

Overview

Welcome to Deltek Costpoint 8.0.7 Release Notes. These release notes contain a summary of the following:

- Enhancements
- Software Issues Resolved

These release notes address all of the modules associated with Deltek Costpoint 8.0.7, 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

Costpoint Release Notes are now delivered in HTML format and can be viewed at this link: https://help.deltek.com/product/Costpoint/8.0/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 all Costpoint systems selected. If a Time & Expense segment exists, the installer searches for the presence of a Time & Expense license in that Costpoint system, and lists any systems for which there is no Time & Expense license.

If a prompt displays, review the list and select the appropriate action:

- Using the Apply License utility in the Costpoint DB Wizard, apply a Time & Expense license to the Costpoint system(s) in the list for which the connected Time & Expense segment is not for a stand-alone, external connection that should have a Time & Expense license applied to it.

  Any stand-alone, external Time & Expense segments for which a Time & Expense license is not present, or for which the Time & Expense segment is for a Time & Expense 901 system, will not have the MR Time & Expense patches, SPs, or Data Dictionary files applied to them. These Time & Expense segments are marked as External TESS segments.

- If all the systems listed are actual stand-alone, external (non-licensed) Time & Expense segments and you want them converted to external segments without applying the MR to them, click **OK** to proceed.

If you are unsure, please contact Deltek Costpoint Technical Support.

Enhancements

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

Regulatory Enhancements

State

Colorado 2021 SUTA Electronic Filing

Colorado released its FTP guide for quarterly wage reports, which will be implemented by the first quarter due date of tax year 2021. The format changed for the **Reporting Quarter and Year** field in positions 215-220 of the ICESA S record.

The **Reporting Quarter and Year** field should provide the year (four digits) and then the quarter (two digits: 01, 02, 03, or 04) in the YYYYQQ format. For example, the new format for the 1st quarter of 2021 is **202101**.

This release updates the Create Quarterly SUTA Tax File (PRPSMM) screen to support Colorado's new requirement.

> **Attention:** For more information, refer to:
> https://cdle.colorado.gov/sites/cdle/files/documents/WageFTPInstructions.pdf.

Maryland 2021 Tax Table Updates

The maximum standard deduction used in the percentage methods increased from $2,300 to **$2,350** annually.

> **Attention:** For more information, refer to:
> https://marylandtaxes.gov/forms/20_forms/Withholding_Guide.pdf.

> **Note:** This enhancement requires patch_800_10494.

Virgin Islands 2021 SUTA Wage Base

The SUTA limit for 2021 is **$32,500**. This Costpoint release adds tax table records effective 01/01/2021 for the updated unemployment-taxable wage base of the Virgin Islands for tax year 2021.

> **Note:** This enhancement requires patch dbc_800_10468.

Installation

MR Installer

When the MR installer adds the CostpointToolsGroup permissions to the Middleware folder after selecting a new WebLogic feature, the MR installer will also select **Enable Inheritance** and select the **Replace all child object permission entries with inheritable permission entries from this object** check box.

Projects

Application Optimization: Update Billing Tables Bill Labor Category Description

Update Billing Tables Bill Labor Category Description has been enhanced to process more efficiently and decrease its runtime during simultaneous or batch processing. Deltek recommends that you install the Costpoint 8.0.7 MR in a test environment and test the application before deploying the MR to production.

Reports & Analytics

Benefit Enrollment Report

The new Benefit Enrollment Report is now available for users who have access to the HR area. This report is in **Team content » Costpoint Enterprise Reporting for HR and Payroll » HR Reports**. The report displays the list of benefit enrollment choices for an employee and their dependents. The output from this report can be used as exported data for the Everything Benefits product.

Enhanced Labor Detail Drill-Thru in the Project Status Report

The Labor Detail has been modified to use the secured Project Reporting model. This enables the application of model security and labor suppression, where you can hide labor amounts on reports. With the inclusion of account headers and account footers, users can now see details by account, including subtotals.

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.

Accounting

Accounts Payable » Create Debit Memos

Defect 1401484: When you created a debit memo for a purchase order (PO) voucher that has **Use Tax** and **Recovery Rate**, the **Recovery Amt** was calculated incorrectly upon posting of the debit memo.

Accounts Payable » Manage Purchase Order Vouchers

Defect 1412149: You encountered an error when you created a purchase order (PO) voucher using the Web Interface Console (WIC).

Admin

Job Management » View Action and Report Status

Defect 1410830: If you executed the **View Action and Report Status** process using the icon in the View Action and Report Status (SYQJSTAT) application, you could see the jobs of other users.

Contracts

Contracts » Manage Subcontracts

Defect 1397206: If the purchase order (PO) assigned to the subcontract has a status of **Void**, Costpoint displayed the following error message when you changed the status of the subcontract record from **Active** to **Inactive** and tried to save the record: "The Record Status cannot be changed to 'Inactive' if there are Purchase Orders with a status of 'Open' or 'Pending'."

Opportunities » Manage Opportunities

Defect 1408071: The following updates have been made on this screen so you can directly link opportunities to leads/contacts and better track leads/contacts that are related to a specific opportunity:

- The **Lead Customer** and **Lead Contact** fields on the General tab of Manage Opportunities have been replaced by the **Lead Contact** field. In this new field, you can enter or click lookup to select

a lead/contact related to the opportunity. Only those records that exist on the Manage Leads and Contacts screen are available for entry/selection.

▪ After you save the opportunity record, Costpoint links the lead/contact to the opportunity, and the opportunity record will display on the Opportunities subtask of Manage Leads and Contacts when you access the lead/contact record.

Resources » Manage Leads and Contacts

Defect 1407178: In Manage Opportunities, you can now directly link a lead/contact to an opportunity through the new **Lead Contact** field on the General tab (see Defect 1408071 for more details). In accordance with this change, Manage Leads and Contacts has been updated to get the opportunity record associated with the lead/contact through the new field and display that opportunity record on the Opportunities subtask when accessing the lead/contact record.

Framework

External Tools » INTGR

Defect 1415846: When you tried to log into the Costpoint Web Integration Utility, you might have received the following error: "Can't verify user/password combination: null". As a workaround, you can create a Database authenticated user.

Framework

Defect 1405877: You received a critical system error when you entered and saved data in a content data field on the Manage Contracts screen because its field name was too long. As a workaround, you can clear the **Use to Link Content to Costpoint Records** check box for the content data field on the Content Data Fields subtask of the Manage Application/Content Links screen.

Defect 1411888: During the workflow approval process, you might have received an error when you tried to approve an AP Voucher record using the APMVCHR_LN and GLMJE_JETRN_DTL result sets.

Defect 1415807: An automated test workflow action "To be Removed: Test WF" was not removed from the production version of Costpoint.

If you run this action by accident, it will run and complete test workflow cases for all queried records. Your database administrator could run the following command to delete all test cases created by this action:

DELETE FROM WFA_WF_CASE WHERE START_USER_ID='#TEST#USER'

Installation

MR Installer

Defect 1413574: You might have received an error when you tried to log into Costpoint. As a result, the MR installer was updated to search for custom cookie names in the existing weblogic.xml file and, if they exist, copy them into the newly installed weblogic.xml file.

As a workaround, shut down all Weblogic nodes, open the Config Utility, and click **Save**. Then, restart the Weblogic nodes.

Materials

Engineering Change Notices » Apply Engineering Change Notices

Defect 1410490: When **Separate Items by Company** was selected on the Configure Product Definition Settings screen, and you loaded an engineering change notice (ECN) and tried a preview, you encountered a critical system error.

Inventory » Import Inventory Transactions

Defect 1406827: When you imported an inventory transaction on the Import Inventory Transactions screen and **Auto-Assign Transaction IDs** was selected, the next inventory transaction ID that should be autoassigned was skipped on the Manage Warehouses screen.

Material Requirements Planning » Manage MRP Action Messages

Defect 1380851: Material Requirements Planning (MRP) created reschedule order dates similar to the suggested due dates even though the purchase order (PO) had delivery schedules.

Defect 1412420: When you ran MRP, rescheduled the due date, implemented it, and clicked **Save**, the due date did not change.

Material Requirements Planning » Update Material Requirements Plan

Defect 1407643: When you ran Material Requirements Planning (MRP) and reviewed MRP Action Messages, submessages were not found, and MRP bought orginal parts instead of using substitutes in stock. This defect affected MSS database users.

Defect 1411653: When you ran Update Material Requirements Plan, the process completed with errors.

Procurement Planning » Manage Simple Purchase Requisitions

Defect 1401486: When you created a requisition, the **QC Insp Reqd**, **Srce Insp Reqd**, and **Cert Conf Reqd** were set to **None** instead of **No**.

Product Definition » Import Items

Defect 1406832: When parts/items were separated by company, you were unable to load parts and costs even though you were logged into the the company where the parts exist.

Product Definition » Manage Parts

Defect 1410488: When you cloned parts, the cloned parts inherited the item billings selling description from their cloned part instead of the selling description from the new part.

Purchasing » Import Purchase Orders

Defect 1406837: When you loaded a file for a service line without a **Ship ID**, you encountered a validation error.

People

Benefits » Create 1094-C and 1095-C Electronic File

Defect 1411964: You encountered an AIRSH100 XML file schema validation failure for tax year 2020. This issue may be caused by out of sequence elements. This affects Costpoint users who electronically file ACA reporting.

Benefits » Manage Benefit Plans

Defect 1401385: The application should not enable the **Evidence of Insurability** check box based on the **ESS Version** field on the Configure Global Settings screen.

Employee » Manage Employee Information

Defect 1368602: The label of the requisition status option in the **Approval Information** group box should be changed from "Disapproved" to "Rejected."

Defect 1391808: The **Deltek Time & Expense User** check box should be removed from the screen. This change should be included in the fix for defect 1323476, which removed the **Use as login ID for Deltek Time & Expense** check box from the Manage Users screen.

Employee » Manage Job Templates

Defect 1400143: The label of the requisition status option in the **Approval Information** group box should be changed from "Disapproved" to "Rejected."

Employee » Transfer Talent Management Data

Defect 1400139: The screen should provide the ability to exclude job templates/requisitions that have a status of **Filled** and/or **Rejected** when you export data to Deltek Talent Management.

Employee Self Service » Activate Retirement Changes

Defect 1402260: When you ran the Activate Retirement Changes process, the application did not apply newly added retirement benefit limits to the employee's retirement benefits.

Employee Self Service » Address/Phone

Defect 1366300: The label of the check box should be changed from "Update Vendor Address with Mailing Address" to "Also update my accounts payable address." If you edit any of the fields in the **Mailing Address** group box, the application should enable and select the **Also update my accounts payable address** check box. The screen should also display a message which indicates that the accounts payable address was updated.

Employee Self Service » Benefits Enrollment

Defect 1393082: The current year limit for FSA displayed under the current contribution, which caused confusion for employees. The current year limit should be set to zero if employees do not have a current election.

Employee Self Service » Life Events/New Hires

Defect 1368599: The application did not allow you to enter a medical care FSA annual amount that was equal to the YTD Total if the value was below the minimum election amount.

Defect 1368601: The application did not allow you to enter a dependent FSA annual amount that was equal to the YTD Total if the value was below the minimum election amount.

Defect 1393300: The label of the check box on the Address/Phone tab should be changed from "Update Vendor Address with Mailing Address" to "Also update my accounts payable address." If you edit any of the fields in the **Mailing Address** group box, the application should enable and select the **Also update my accounts payable address** check box. The screen should also display a message that the accounts payable address was updated.

Employee Self Service » Retirement Benefits

Defect 1411968: The following information message still displayed even if the employee had no record on the Manage Retirement Elections screen: "The contribution amount shown is currently pending."

Labor » Export Data to Deltek Time and Expense

Defect 1408881: When you deleted all the Assign PLC to Employee Workforce records, Costpoint updated the Deleted Project Employee Work Force Records (DEL_PROJ_E_LAB_CAT) table with the deleted records. However, Costpoint did not delete the records from DEL_PROJ_E_LAB_CAT after you ran the Export to Deltek Time & Expense process. This caused the system to continuously include the deleted records in the Charge export file.

Labor » Import Timesheets

Defect 776846: A system error occurred when you attempted to process a CSV file that contained organization values with a period (for example, 1.1.100). This issue occurred if you selected the **Fixed Length** option as the **File Format**. As a workaround, use the Top Level Organization in the import process.

Labor » Import Timesheets from Deltek Time and Expense

Defect 605768: The TS_HDR_SRL column value should be unique for each Timesheet Header (TS_HDR) table record. When the application inserts records on the Transaction Posting Summary (GL_POST_SUM) table, the LVL1_KEY column value (which comes from the TS_HDR_SRL column) may repeat as long as the LVL2_KEY column value (which comes from the TS_LN_KEY column) is unique.

Defect 1424952: The defaulting PLC was incorrect if the defaults were set up at the project's top level. This defect affects Costpoint cloud users.

Leave » Manage Leave Types

Defect 1375280: The application's basis for enabling/disabling the **Ceiling Timing** options must be updated.

Payroll » Create ACH Bank File

Defect 1402782: The application should allow you to generate a direct deposit file for a pay cycle where the employees within that pay cycle are assigned to different taxable entities.

Payroll » Print Payment Advices

Defect 1415297: The payment advices did not display correct year-to-date (YTD) amounts.

Payroll » Update Employee Package Deductions

Defect 1397297: The application did not reflect a life event that reduced a deduction to $0. As a workaround, you can manually update the end date for the deduction.

Personnel » Approve Position Requisitions

Defect 1400160: The label for the requisition status option should be changed from "Disapproved" to "Rejected."

Personnel » Print OSHA Report

Defect 1263752: When you did not have a license for Costpoint Payroll, the estimated figures for the following were incorrect:

- Annual Average Number of Employees
- Total Hours Worked by All Employees Last Year

The **Annual Average Number of Employees** used the hire/termination dates to estimate employment instead of the number of employees paid in every pay period. The **Total Hours Worked by All Employees Last Year** did not exclude non-work time such as vacation, sick leave, and holidays. Temporary employees are also being excluded in the employment information.

This defect affects you if you are required to report OSHA 300A.

To address this issue, Costpoint applies the following updates to the OSHA 300A - Employment Information:

- A **Use Pay Periods** check box was added as an option for the Annual Average Number of Employees. This option is only available and selected by default if you are licensed for Payroll.
- If you select the **Use Pay Periods** check box, then the annual average number of employees will be calculated by adding the number of employees paid in every pay period and dividing the sum by the number of pay periods.
- The annual average number of employees will be calculated depending on the hire/term date if you are not licensed for Payroll or if the **Use Pay Periods** check box is clear.
- The total hours worked will be based on the pay type hours in employee earnings if you are licensed for Payroll.
- The total hours worked will be based on the charged hours in posted timesheets if you are not licensed for Payroll.
- All employees will be considered in the annual average number of employees and total hours worked. Temporary employees were previously excluded.
- Leave hours and non-work time will be excluded from the total hours worked. These hours were previously included.

Team Management » Total Comp/Benefits Statement

Defect 1392038: The Total Compensation Summary table on the screen did not display the employee's leave benefits.

Planning

Organization Budgeting » Organization Budgets/Outlooks

Defect 1402748: The system was not computing correctly for default accounts under Labor Utilization.

Projects

Billing » Calculate Standard Bills

Defect 1402900: When you posted a purchase order voucher, the functional transaction amount in Manage Open Billing Detail did not match the functional voucher amount in Manage Purchase Order Vouchers. This caused an issue when billing. If you put the entire transactional amount on hold in Manage Open Billing Detail, a penny remained in the functional currency, causing the system to invoice the entire transactional amount.

Billing » Create iRAPT Billing Files

Defect 1417866: When you tried to create an iRAPT FTP file containing more than 400 bill nodes, a critical system error occurred.

Billing » Manage Billing History

Defect 1375959: Costpoint cleared the value in the **Item or Schedule Description** field when you edited a record with **Trans Type** set to **Schedule** and then saved the record. For manually entered new records, the field value was also cleared when you saved the record.

Billing » Print Unbilled Analysis Report

Defect 1417167: Performance tuning was conducted for this application to prevent it from hanging.

Cost and Revenue Processing » Compute Burden Costs

Defect 1408765: When you ran this application for a whole period, the numbers in other subperiods were repeated when the value should have been zero. As a workaround, you can compute burden costs per subperiod.

Cost and Revenue Processing » Compute Revenue

Defect 1402286: Inception-to-date (ITD) amounts displayed only at the funding level. ITD amounts should have displayed both at the funding and upper levels.

Defect 1412316: Compute Revenue was enhanced to support better partitioning by company.

This requires patch dbc_800_10496.

Subcontractor Management » Create Subcontractor Invoices

Defect 1385961: Costpoint did not correctly calculate the subcontractor invoice when you reversed hours that were over the ceiling.

Reports & Analytics

Business Intelligence » Business Intelligence

Defect 1367309: The PO Commitment drill-through report displayed null or blank values when it was launched through the Project Status Report in Costpoint BI Projects. As a workaround, run the PO Commitments Detail as a stand-alone report found in **Team content » Procurement » PO Commitments Detail**.

Defect 1395532: The Project Status drill-through reports ran the legacy version of the GL Detail Report. The drill-through reports should have pointed to the new Project Ledger Detail report.

Defect 1412859: The Labor Detail drill-through report in **Team content » Projects » Reports » Project Status Report** ran the legacy version of the Labor Detail Report. The drill-through report should have pointed to the new Labor Detail Report.

Time and Expense

Configuration » Charge Trees

Defect 1412321: Clients with charge branch codes that appeared in more than one charge tree could not drill down to lower charge branches because those branches failed to display. They could, however, manually enter charges located on those lower branches.

> **Note:** Rebuild lookup data and flags must be run after this fix is installed in order to correct already existing data and address the lookup problem.

Configuration » Import Master Data

Defect 1406570: Changes were made to the charge import process to improve performance.

Defect 1411884: When using wildcard links, file importation employed direct validation, resulting in the file's failure to upload.

Defect 1415455: Currency Schedule (version 0) (Exchange Rate Service) failed to import. Instead, the file was moved from the import folder to the trash folder, with no import error reported.

Configuration » MyDesktop

Defect 1407594: Though the **Allow Employee Deletion** option was not selected on the Manage Pay Methods screen, the **Hide** check box for the Outstanding Expenses subtask in MyDesktop displayed as clear and enabled and, therefore, allowed employees to hide the expense.

Expense » Batch Expenses

Defect 1407592: Upload of VISA files during an upgrade caused a system error, which did not occur when these files were uploaded to the earlier version (TE 9.0.1).

Defect 1413535: An "Invalid Amount" error occurred when you imported AMEX (KR1025) charges from the United Kingdom.

Defect 1416302: When you imported VISA batches with the Wizard Type Indentification subtask set to direct the transaction to a different pay method, the import process instead used the main Batch types pay method.

Expense » Compute Commitments

Defect 1403113: When an expense authorization included multiple lines, the first claimed amount reduced all the lines instead of just the first one.

Expense » Expense Report

Defect 1410722: The Expense Date was not modifiable on imported credit card expenses, even though configuration settings allowed expense date editing.

Defect 1412422: When you deleted an Expense Report attachment, it was not removed from the receipt location as well.

Defect 1419377: You received an error message, "Expense incurred cannot be less than room rate," even though the Reimbursable and Other Expense amounts you entered equaled the Expense Incurred.

Defect 1419957: If your role allowed you to modify submitted expense reports (for example, to change a lodging expense to Other) without setting the report back to Draft status, some pending tasks were deleted from the workflow table.

Expense » Manage/Approve Expense Reports

Defect 1419487: When an Administrator revised a submitted expense report that included workflow tasks (for example, expense attachments) but did not save the record, the workflow tasks were removed, even though configuration did not require the expense report to be reverted to a Draft status and the revisions were net zero.

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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