Deltek Costpoint® 8.0.21

Release Notes

May 12, 2022

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Contents

Overview

Welcome to Deltek Costpoint 8.0.21 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 8.0.21, 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

State

Kentucky Revised 2022 SUTA Wage Base

Kentucky suspended the taxable wage increase for 2022. The state's unemployment-taxable wage base for 2022 decreases from $11,100 to **$10,800**. This update is effective January 1, 2022, retroactively.

> **Attention:** For more information, refer to: https://kewes.ky.gov/Contact/contacts.aspx?strid=2.

> **Note:** This enhancement requires patch dbc_800_10865.

Maryland 2022 Tax Table Updates

Maryland's 2022 withholding guide, which has a March 2022 revision date and a January 2022 effective date, increases the range of the state's standard deduction. The standard deduction, which is 15% of the employee's gross income subject to a minimum and maximum, increased to a minimum of **$1,600** and a maximum of **$2,400**, up from a range of $1,550 to $2,350.

The guide's percentage methods were otherwise unchanged from the previous revision dated January 2021.

To support the state updates, this release applies changes to the Manage State Standard Deductions screen.

> **Attention:** For more information, https://marylandtaxes.gov/forms/21_forms/Withholding_Guide.pdf.

> **Note:** This enhancement requires patch dbc_800_10871.

Utah 2022 Tax Table Updates

Utah published the Withholding Tax Guide with the following updates effective May 1, 2022:

- The tax rate decreases from 4.95% to **4.85%**.
- The base allowance for single employees increases from $360 to **$390**. The base allowance for married employees increases from $720 to **$780**.
- In Line 4 of the withholding tax formulas (to determine by how much the allowances are reduced), the amounts subtracted from wages increased. For single employees, the amount increases from $7,128 to **$7,774** annually. For married employees, the amount increases from $14,256 to **$15,548** annually.

To support the state updates, this release applies changes to the following screens:

- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Tax Tables (PRMSTT)

Attention: For more information, refer to: https://tax.utah.gov/forms/pubs/pub-14-may2022.pdf.

Note: This enhancement requires patch dbc_800_10871.

People

W-2c Electronic Filing Support

The Taxpayer First Act, which became Public Law 116-25 on July 2019, requires more employers to file W-2s or W-2Cs electronically. Although the IRS has not yet issued formal regulation on the implementation, here is the tentative schedule:

- By midnight on January 31, 2022, employers who file 100 or more W-2s or W-2Cs will have to send W-2s or W-2Cs to SSA electronically.
- By midnight on January 31, 2023, employers who file 10 or more W-2s or W-2Cs will have to send W-2s or W-2Cs to SSA electronically.

When the IRS issues formal guidance on implementing this new law, the above date may change. The IRS has the authority to penalize any employer who does not file electronically if they meet the threshold.

Costpoint has existing capability to generate EFW2. However, to support IRS requirements, Costpoint adds the ability to generate EFW2C to the Create Federal W-2 File screen. W-2 corrections beginning tax year 2021 will also be supported.

Attention: For more information, refer to:

- **Taxpayer First Act**: https://www.ssa.gov/employer/taxpayer.html
- **Filing Forms W-2c Electronically (EFW2C) for Tax Year 2021**: https://www.ssa.gov/employer/EFW2&EFW2C.htm

Create W-2 Table (PRPCW2)

You can now generate W-2c records on the Create W-2 Table screen. The screen provides the following new options:

Field	Description
Record Type	Select which type of records you are processing. Valid options are: ▪ **W-2**: Select this option if you are processing Form W-2 records. ▪ **W-2c**: Select this option if you are processing Form W-2c records. A W-2c can only be created if a W-2 record exists for the Payroll Year/Taxable Entity/Employee/Tax Service Group ID. W-2c records

Field	Description
	can be viewed and edited on the Manage W-2Cs screen. If you select this option, the application will generate the new Create W-2c Table Report. **Note:** Deltek recommends the use of Arial Narrow font for the Create W-2c Table Report.
Recreate W-2s/W-2Cs	Select this check box to recreate the W-2 or W-2c table. When you select this check box, Costpoint implements the following: ▪ If you select **W-2** as the **Record Type**, then any edits entered on the Manage W-2s screen are lost when you recreate the W-2 table. ▪ If you select **W-2c** as the **Record Type**, then any edits entered on the Manage W-2Cs screen are lost for the record with the highest sequence number when you recreate the W-2c table.

The application will insert W-2c data into the following new W-2c tables:

- FED_W2C_FILE
- BOX_12_W2C_FILE
- STATE_W2C_FILE
- LOCAL_W2C_FILE

Manage W-2Cs (PRMW2C)

The new Manage W-2Cs screen provides you with the ability to add, retrieve, view, or edit W-2c records. This includes the following actions:

- View or edit W-2c data created by the Create W-2 Table screen.
- Change amounts of an existing W-2c.
- Enter new records.
- Manually add a W-2c record to correct a previously reported W-2 or W-2c.

The information on this screen will be used to create the electronic federal W-2c (EFW2C) on the Create Federal W-2 File screen. You can edit this screen after creating the W-2c table on the Create W-2 Table screen and before generating the electronic W-2c on the Create Federal W-2 File screen. To access this screen, click **People » Payroll » Year-End Processing » Manage W-2Cs**.

Create Federal W-2 File (PRPW2F)

You can now create an electronic W-2c file on the Create Federal W-2 File screen. The screen provides the following new options:

Field	Description
File Type	Select the type of file that you are processing. The following are the options:

Field	Description
	▪ **EFW2**: Select this option if you are creating electronic W-2 (EFW2) for submitting annual Form W-2 Copy A (Wage and Tax Statement W-2) data. ▪ **EFW2C**: Select this option if you are creating electronic W-2c (EFW2C) for submitting annual Form W-2C Copy A (Corrected Wage and Tax Statement W-2C) data. If you select this option, the application will generate the new Federal W-2c File Report. **Note:** Deltek recommends the use of Arial Narrow font for the Federal W-2c File Report.
Originally Reported Establishment Number	The Establishment Number is a four-position identifier determined by the employer, which further distinguishes the employer reported in an RCE (Employer) Record. The establishment number can be alpha, numeric, or alphanumeric. Enter the incorrectly reported Establishment Number. This field will only be enabled if **File Type** is **EFW2C**. Leave the field blank if you are not correcting the originally reported Establishment Number.
Correct Establishment Number	The Establishment Number is a four-position identifier determined by the employer, which further distinguishes the employer reported in an RCE (Employer) Record. The establishment number can be alpha, numeric, or alphanumeric. Enter the correct Establishment Number. This field will only be enabled if **File Type** is **EFW2C**. Leave the field blank if you are not correcting the originally reported Establishment Number. You may use this field even if you are not correcting the originally reported Establishment Number. For multiple RCE (Employer) Records with the same EIN, you may use this field to assign a unique identifier to each RCE (Employer) Record. For example, store or factory locations or types of payroll.

Export Payroll Taxes (PRPEXTAX)

You can now export W-2c data on the Export Payroll Taxes screen. The screen provides the following new option:

Field	Description
W-2c	Select this option to create the W-2c tax file. Any data provided in the Manage W-2Cs table will be exported. If you select this option, the application will generate the new Export Payroll Taxes Report (W-2c File).

The application will source the W-2c data from the following new W-2c tables:

- FED_W2C_FILE
- BOX_12_W2C_FILE
- STATE_W2C_FILE
- LOCAL_W2C_FILE

The following are the updates to the file and report:

- A new field, **Record Type**, was added to the W-2 file to distinguish the W-2 (Record Type: W2) information from W-2c (Record Type: W2C). If the **Record Type** is **W2**, existing W-2 fields will continue to report the W-2 information. If the **Record Type** is **W2C**, existing W-2 fields will report the correct information from W-2c tables.
- New W-2 File fields were added to report the previously reported information from W-2c tables.
- A new report, Export Payroll Taxes Report - W-2c File, was added to separately report W-2c data.

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report now provides information for the following new tables:

- FED_W2C_FILE
- BOX_12_W2C_FILE
- STATE_W2C_FILE
- LOCAL_W2C_FILE

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 » Select Vouchers For Payment

Defect 1621887: When you validated pay when paid vouchers, the message "No records meet the selection criteria" was displayed even when a PO voucher with a **Pay When Paid** status exists. This occurred when:

- The voucher you attempted to validate was linked to a project that has a loaded labor billing formula.
- You updated the invoice status to **SELECTED** on the Standard Billing Info tab of the Manage Standard Bills screen.
- You updated the **Amount to Bill** field on the Detail subtask of the Manage Standard Bills screen to a value that is greater than the invoice amount on the Manage Purchase Order Vouchers screen.
- You updated the **Amount Received** field on the Invoice Information Detail subtask of the Manage Cash Receipts screen to a value that is less than the **Amount to Bill** field on the Detail subtask of the Manage Standard Bills screen.

As a workaround, do not update the **Amount to Bill** field in Manage Standard Bills and the **Amount Received** field in Manage Cash Receipts.

Admin

Security » Manage Segregation of Duties Conflict Overrides

Defect 1625699: When you ran Manage Segregation of Duties Conflict Overrides (SYMCFLO) with the **Manually Approved** check box selected, the **Name** field populated with a random username for all groups and users listed.

Materials

Product Definition » Manage Parts

Defect 1615125: When you modified the lead time table, the total lead time days were not equal to the item lead time days upon checking on the Lead Time subtask.

Purchasing » Import Purchase Orders

Defect 1628552: When you imported a purchase order (PO), the Buyer's Home Organization was not populated in Manage Purchase Orders. As a workaround, use the Load Purchase Order Org IDs (POPLDORG) application.

Receiving » Manage Purchase Order Receipts

Defect 1616200: When you ran purchase order (PO) reconciliation, the functional received amount populated with the transactional amount, which caused issues with the PO line functional received amounts.

Defect 1628207: When you autoloaded a Subcontractor Agreement PO for which you previously set the exchange rate to EUR to USD and USD to EUR, and you then set the received quantity and clicked **Save**, you encountered the following error: "Accepted amount cannot be greater than the received amount."

People

Benefits » Store Employee Benefit Options Offered

Defect 1626152: The application generated excessive warnings for previously processed records.

Employee » Manage Leave Beginning Balances

Defect 1625162: The screen should display a warning if your Balance Transfer Information setup will transfer the balance from a leave code that is based on units of hours worked to one that is not.

Labor » Allocate Compensated Overtime Across Timesheet Lines

Defect 1593063: The allocation was incorrect when you selected the **Weekly** option as the **Overtime Calculation Method** for processing a single timesheet with multiple timesheet lines that have the following setup:

- The timesheet lines had line dates.
- The **Overtime Basis** for the state was **Weekly**.

In this scenario, the allocation only worked correctly when you selected the **Daily** option as the **Overtime Calculation Method**. This setup is wrong since the **Overtime Calculation Method** should match the state setup.

Labor » Manage Union Profiles

Defect 1602020: The Project Information subtask required valid values in the **Crew** and **Crew Chief** fields. This prevented you from entering new union project information if your company does not have crews/crew chiefs. To address this issue, the **Crew** and **Crew Chief** fields on the subtask will no longer be required.

Payroll » Export Payroll Taxes

Defect 1622205: For an Employee Tax (ET) record with a tax type of LCEE, the application should populate field 45 (Employee Resident PSD Code) with the value from the PA_PSD_CD field on the EMPL_TAX record of the employee.

Planning

Administration » Maintain Fiscal Year Periods

Defect 1625855: The application created duplicate records in the ESUB_PD table when you entered fiscal years with an alphanumeric code.

Project Budgeting » Import Budget/EACs from Excel

Defect 1579812: The performance of Import Budget/EACs from Excel was slow due to the application's validation and error-reporting routines.

Project Budgeting » Project Budget/EAC Mass Utilities

Defect 1622343: You were unable to create an EAC for a project if **PoP Ended** was selected. To correct this, the application was updated to allow you to create an EAC when the budget period of performance has ended.

Project Budgeting » Project Budgets/EACs

Defect 1619610: The hours in Employee Schedule did not accurately reflect adjustments to holiday hours made in Budget by Resource.

Defect 1628557: The rate ceiling of the top-level account was not used to calculate the project's burdened cost.

Defect 1628984: The Revenue Analysis subtask did not display correct values for costs and revenues when you entered hours and rates on the Subcontractor Hours and Consultant Hours subtasks, both in new and existing Budgets/EACs.

Defect 1630946: When you calculated burdened cost using a custom Burden Template, the fringe amounts obtained were not as expected.

Project Budgeting » Project Spend Chart

Defect 1575802: You encountered an error when you attempted to print the Project Spend Chart that was downloaded and saved in PDF format.

Resource Planning » Budget by Resource

Defect 1604368: When the same Generic Staff/Account/Org/PLC combination was present in the Project Budget or EAC, the Generic Staff total hours doubled in Budget by Resource.

Projects

Billing » Calculate Retroactive Bills

Defect 1358728: Costpoint allowed you to enter and save a non-existent period in the **Period for Rates** field when the **Indirect Costs** option was selected.

As a workaround, enter a valid period and recalculate bills.

Defect 1618701: This application did not calculate the retroactive amount when the invoice net amount was zero.

Billing » Calculate Standard Bills

Defect 1631365: This application did not correctly calculate hour ceilings when both hour ceilings and employee hour ceilings exist.

As a workaround, you can remove either the hour ceilings or the employee hour ceilings.

Defect 1645901: The application did not correctly allocate the **Retainage** and **Over Cost Ceiling** amounts in ACRN bills, which resulted in a mismatch between the **Invoice Amount** and **Current ACRN Value** displayed on the Manage ACRN Bills screen and ACRN Billing Edit Report.

As a workaround, you can edit the **Current ACRN Allocation Value** in Manage ACRN Bills.

Defect 1650571: You encountered the following system error when you ran this application: "Can't parse sql statement: INSERT INTO (BILL_EDIT_KEY, BILL_FM_GRP_NO, BILL_FM_GRP_LBL...)." This error occurred when both the **Show Timesheet Date** and **Show Timesheet Comments** check boxes were selected on the Hours tab of the Manage Generic Billing Formats screen.

Defect 1650657: A system error occurred when you calculated a bill for a project with **Customer Terms** set to the 31st DOM in Manage Project User Flow.

As a workaround, on the Proj Bill Info subtask of Manage Project User Flow, set the project's **Customer Terms** to the 30th DOM (that is, the customer terms selected should have **Day of Month** set to **30** in Manage Customer Terms).

Defect 1650658: An error occurred upon running this application when **Position of Fiscal Year Code** was set to **First** for Prior FY on the Configure Billing Settings screen.

As a workaround, set **Position of Fiscal Year Code** to **Last**.

Defect 1650660: When the **Use Transactional Currency Billing** check box was selected on the Manage Project Billing Information screen and you ran Calculate Standard Bills for records with a billing currency not equal to the functional currency, the total of the WAWF_WH_AMT column did not match the Withholding amount under the MU_RTNGE_AMT column in the BILL_EDIT_DETL table.

Defect 1650661: There was a rounding issue in WAWF columns for multicurrency bills in the BILL_EDIT_DETL table, which caused a mismatch between the Current ACRN Value and Invoice Amount on the Manage ACRN Bills screen.

Defect 1653860: Some WAWF columns were not populated in the BILL_EDIT_DETL table after you calculated standard bills for some billing formulas.

Defect 1653937: The application did not calculate burden costs when there was a burden cost ceiling and the account was in the base of more than one pool.

As a workaround, you can manually calculate burden costs, or you can remove ceiling entries and edit the standard bill.

Cost and Revenue Processing » Compute Revenue

Defect 1610370: Primary and foreign keys have been removed from the following ADT tables to improve this application's performance:

- CEIL_BURDEN_CST_ADT
- CEIL_DIR_CST_ADT
- CEIL_DIR_HRS_ADT
- EMPL_CEIL
- OVRIDE_FEE_ON_BURD_ADT
- OVRIDE_FEE_ON_DIR_ADT
- OVRIDE_MLT_ON_DIR_ADT
- PROJ_ACCT_DISC_ADT
- PROJ_ADT
- PROJ_MOD_ADT
- PROJ_REV_SETUP_ADT
- PROJ_VOLUME_DISC_ADT
- REV_ADJ_HIST_ADT
- VEND_CEIL_ADT

Defect 1625763: Performance tuning has been conducted to improve this application's runtime.

Cost and Revenue Processing » Post Revenue

Defect 1621175: Costpoint did not allow you to post revenue to inactive account/organization combinations when **Rate Type** was set to **Target**, **Total Target Revenue Amount** was equal to **Reallocation Amount**, and **Total Target Revenue Amount** was not equal to zero in the PROJ_SUM table. Actual revenue and reallocation amounts, on the other hand, were not equal. The system should not have validated for invalid account/organization combinations.

Project Setup » Manage Project User Flow

Defect 1621125: When you made changes on the User-Defined Info subtask, Costpoint updated PROJ.TIME_STAMP for the edited project along with its lower-level projects. The system should have updated the time stamp only for the edited project.

Time & Expense

Expense » Expense Report

Defect 1591974: When you claimed a batch meals expense that was attached to an expense that was set up as a per diem ceiling and the expense amount was over ceiling, it was charged entirely to under ceiling.

Time » Timesheet

Defect 1630393: A performance issue occurred with the Group Cache charge lookup/manual entry if the employee was assigned to a large number of charge restrictions (around 90,000 or greater).

Defect 1636606: Charge lookup favorites displayed only ten rows when Group Cache was enabled.

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