Deltek Costpoint® 7.1.24

Release Notes

November 17, 2021

This edition published November 2021.

Contents

Overview

Welcome to Deltek Costpoint 7.1.24 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 7.1.24, 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

2022 Federal Social Security Wage Base

The Social Security (Old-Age, Survivors, and Disability Insurance) taxable wage base increases from $142,800 to **$147,000** for 2022.

> **Note:** This enhancement requires PATCH3867.

2021 Forms 1099-MISC and 1099-NEC Updates

The IRS released the 2021 updates to forms 1099-MISC and 1099-NEC.

> **Note:** The 1099-MISC and 1099-NEC updates discussed in this section are retrieved from the IRS 2021 Instructions for Forms 1099-MISC and 1099-NEC document. Download the official IRS document through this link: https://www.irs.gov/pub/irs-pdf/i1099mec.pdf.

Form 1099-MISC Updates

The following are the changes to form 1099-MISC:

- **Title Change**: The title for form 1099-MISC has been changed from Miscellaneous Income to Miscellaneous Information.
- **Box 11**: Box 11 includes any reporting under section 6050R regarding cash payments for the purchase of fish for resale purposes, from an individual or corporation who is engaged in catching fish.

Form 1099-NEC Updates

- **Box 1**: Box 1 will not be used for reporting under section 6050R regarding cash payments for the purchase of fish for resale purposes.
- **Box 2**: Payers may use either box 2 on Form 1099-NEC or box 7 on Form 1099-MISC to report any sales totaling $5,000 or more of consumer products for resale, on buy-sell, deposit-commission, or any other basis.
- **Resizing**: The IRS has reduced the height of the form so it can accommodate 3 forms on a page.

Print/Create 1099s and Magnetic Media

The Print/Create 1099s and Magnetic Media screen has been updated to accommodate the IRS 2021 updates to forms 1099-MISC and 1099-NEC. When you print 1099s on this screen, the output displays using the 2021 layout for the 1099 forms.

The magnetic media format has also been updated according to the 2021 Specifications for Electronic Filing of Forms.

Note: For details on the 2021 specifications for electronic filing, download the IRS Publication 1220 through this link: https://www.irs.gov/pub/irs-pdf/p1220.pdf.

The new **NEC Copy to Print** group box, which allows you to select the NEC copy you want to print, is now available.

Option	Description
Copy A	Select this option to print the IRS Service Center copy of form 1099-NEC.
Other Copies	Select this option to print the receiver and payer copies of form 1099-NEC.

The options in this group box are enabled if the **Calendar Year** is 2021 and when you select **1099-NEC** in the **Print Options** group box.

State

2022 SUTA Wage Base

This Costpoint release adds tax table records effective January 1, 2022 for states where the unemployment-taxable wage base has been updated for tax year 2022.

Iowa

The SUTA limit for 2022 is **$34,800**.

Montana

The SUTA limit for 2022 is **$38,100**.

Nevada

The SUTA limit for 2022 is **$36,600**.

New York

The SUTA limit for 2022 is **$12,000**.

Washington

The SUTA limit for 2022 is **$62,500**.

Note: This enhancement requires PATCH3863 and PATCH3868.

Georgia 2022 Tax Table Updates

The following are the tax updates for Georgia effective January 1, 2022:

- The standard deduction amount increases from $6,000 to **$7,100** for employees that are Married Filing Joint Return.
- The standard deduction amount increases from $4,600 to **$5,400** for employees that are Single or Head of Household.

- The standard deduction amount increases from $3,300 to **$3,550** for employees that are Married Filing Separate Return.

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

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

Attention: For more information, refer to the following:

- https://dor.georgia.gov/employers-tax-guide
- https://dor.georgia.gov/document/document/2022-employers-tax-guidepdf/download

Note: This enhancement requires PATCH3866.

Wisconsin 2022 Tax Table Updates

The following are the tax updates for Wisconsin effective January 1, 2022:

The income tax rates that are used in the withholding formula range from **3.54% to 7.65%**. The previous range was from 4% to 7.65%.

The formula's tax bracket thresholds and standard deductions increased.

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

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

Attention: For more information, refer to: https://www.revenue.wi.gov/DOR%20Publications/pb166.pdf.

Note: This enhancement requires PATCH3867.

Time & Expense

Pre-Upgrade (8.1) Diagnostics Toolkit

A **Time & Expense » Configuration » Utilities » CP/TE Diagnostics Toolkit** utility was added to version 7.1.24 that enables System Administrators to identify and address potential data discrepancies prior to upgrading to version 8.1, which will be available for general release in the first quarter of 2022.

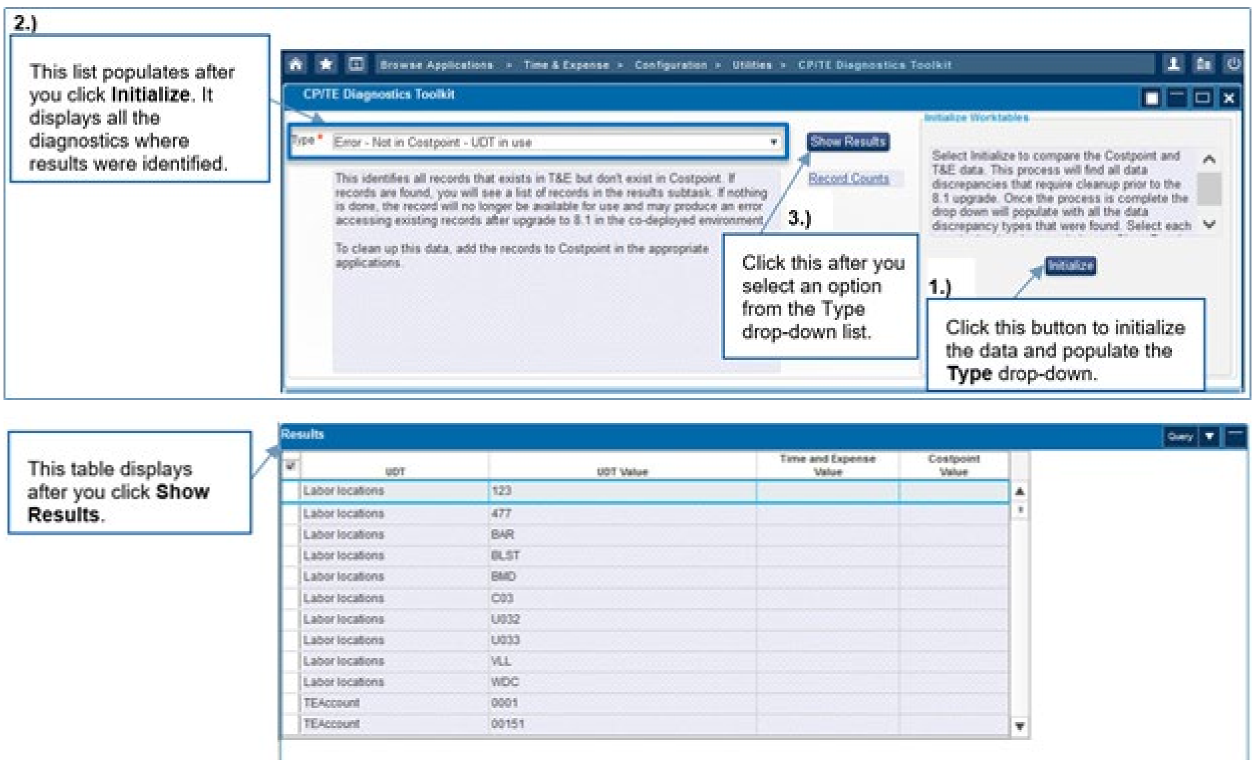
In version 8.1, Time & Expense installations that are co-deployed with Costpoint will read directly from the Costpoint tables for UDTs (01-11) across all domains, and therefore, unresolved data discrepancies, such as when a UDT exists in one system but not in the other, may result in system errors in version 8.1.

The utility includes 19 separate diagnostics, and where issues are identified, it can automatically resolve the discrepancy by setting the value in one system to that of the other, or in some cases, you may be required to manually update the data, such as adding or deleting a UDT.

Although you will be able to run the same diagnostics in version 8.1, discrepancies are resolved more easily from version 7.1.24. After you upgrade, the Costpoint values, such as for UDTs, become the default value, and the older values from Time & Expense are moved to archive tables. So for example, if you want to set the Costpoint value to the Time & Expense value, that option is no longer available in the utility.

Warning: Depending on the issue, failure to correct the data may cause errors due to records no longer being available after you upgrade to version 8.1.

For each item you select under **Type**, the screen displays instructions specific to that diagnostic. The first time you use the application, you must **Initialize** to populate the **Type** drop-down list.



Following the installation of version 7.1.24, do the following to run the Toolkit:

1. Click **Time & Expense » Configuration » Utilities » CP/TE Diagnostics Toolkit**.
2. On the Toolkit screen, click the **Initialize** button.

   This process compares the Costpoint and Time & Expense data to identify discrepancies between them. After the initialization process is completed, the **Type** drop-down list populates with different diagnostics where discrepancies were found. Up to 19 separate types may display.
3. From the **Type** drop-down list, select the diagnostic you want to review and click **Show Results**.

   The Results table is populated with the data discrepancies uncovered by the diagnostic. Optionally, you can click **Record Counts** to display record results for all the separate diagnostics.
4. Depending on the type of diagnostic you selected, one of the following options may display below the Results table:
   - **Set CP Value to T&E Value**: Select this option to change the value in Costpoint to match the value in Time & Expense.
   - **Set T&E Value to CP Value**: Select this option to change the value in Time & Expense to match the value in Costpoint.
   - **Remove from Charge Tree**: This option displays only for the diagnostic that identifies records that exists in the Time & Expense charge tree for UDTs 01-11 but do not exist in Costpoint. Select this option to remove the charges from the T&E charge tree. The charges, if needed, must be manually added to the appropriate application in Costpoint.

   If no buttons display, corrections must be made manually in the appropriate area of Time & Expense or Costpoint.

The table below provides a brief description of each diagnostic that may display under **Type**. Refer to the on-screen instructions in the **CP/TE Diagnostics Toolkit** application for details on how to correct the data for each one that occurs in your system.

Diagnostic Type	Purpose
Error - Not in Costpoint - UDT in use	This identifies all records that exist in Time & Expense but do not exist in Costpoint.
Error - Project required flag does not match – UDT in use	This identifies all accounts where the **Project Required** setting in Time & Expense does not match the same setting in Costpoint.

Diagnostic Type	Purpose
Error - Whether for time and/or expense does not match - UDT in use	This identifies all projects where the time and/or expense value in Time & Expense does not match the same value in Costpoint.
Warning - Abbreviation does not match	This identifies Project and Org records where the abbreviation does not match between Costpoint and Time & Expense.
Warning - Account type does not match – UDT not in use	This identifies accounts where the Time Collection **Account Type** value in Costpoint does not match **Account Type** in Time & Expense.
Warning - Account type does not match - UDT in use	This identifies accounts where the Time Collection **Account Type** value in Costpoint does not match the same setting in Time & Expense.
Warning - Active flag does not match	This identifies all records where the **Active** setting in Time & Expense does not match the same setting in Costpoint.
Warning - Allow Charging flag does not match	This identifies all records where the **Allow Charging** setting in Time & Expense does not match the same setting in Costpoint.
Warning - Calculation does not match	This identifies all Pay Type records where the calculation in Time & Expense does not match the calculation in Costpoint.
Warning - Cost Only flag does not match	This identifies all Pay Type records where the **Cost Only** setting in Time & Expense does not match the same setting in Costpoint.
Warning - Costpoint company does not match	This identifies all Project and MO records where the Costpoint company in Time & Expense does not match the company in Costpoint.
Warning - Description does not match	This identifies all records where the description in Time & Expense does not match the description in Costpoint.
Warning - Factor does not match	This identifies all Pay Type records where the factor in Time & Expense does not match the factor in Costpoint.
Warning - Not in Costpoint but in Charge Tree	This identifies all records that exist in the Time & Expense Charge Tree but do not exist in Costpoint.
Warning - Overtime flag does not match	This identifies all Pay Type records where the overtime setting in Time & Expense does not match the overtime setting in Costpoint.

Diagnostic Type	Purpose
Warning - Project required flag does not match - UDT not in use	This identifies all account records where the **Project Required** setting in Time & Expense does not match the same setting in Costpoint.
Warning - Whether for time and/or expense does not match - UDT not in use	This identifies all project records where the time and/or expense value in Time & Expense does not match the same value in Costpoint.

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 » Edit Voucher Payment Status

Defect 1525681: The Edit Voucher Payment Status table window and the CASH_ACCT_ID and CASH_ORG_ID columns of the OPEN_AP table were cleared. This happened when you used **Find** and **Replace** to change the **Cash Account Description** to an invalid value, used **Find** and **Replace** again to change the invalid value to a correct one, and clicked **Save**.

General Ledger » Manage Journal Entries

Defect 1528717: This screen has been updated to disable recalculation of exchange rates for journal entries created through the Process Organization Changes screen.

General Ledger » Update Tax Report Tables

Defect 1518863: When you ran the update process, tax from standard bills were not included in the Tax Report Header and Tax Report Line tables.

Contracts

Opportunities » Manage Opportunities

Defect 1529353: When you used web services to create an opportunity, the opportunity was created but no value was saved in the ORG_ID column in the OPP_MASTER table. This occurred when there was more than one entry in the BUSINESS_UNIT_ORG table for the same business unit code.

Framework

Framework

Defect 1535095: When you opened the Lookup window to attach a document from Sharepoint to a Costpoint record, the Sharepoint files were not sorted in descending order by the Modified Date.

Materials

Engineering Change Notices » Manage Engineering Change Notices

Defect 1527809: When you entered engineering change notices (ECNs), the Phaseout or Obsolete parts defaulted to **Unreleased** on the EBOM Component subtask.

Procurement Planning » Manage Purchase Requisitions

Defect 1523833: On the Accounts subtask, the **Allocated Amount** was incorrectly calculated during population and validation, which caused a validation error.

Production Control » Enter Manufacturing Order Issues

Defect 1527395: In the Web Integration Console (WIC), you were unable to reverse transactions with a space in the serial number.

Purchasing » Import Purchase Orders

Defect 1513761: When you changed the vendor terms in the purchase order (PO) header and ran an import, you encountered the following error: Vouchers exist for this PO Line. The calculated PO Line Total Amount cannot be less than the Vouchered Amount or Posted Amount.

Receiving » Manage Purchase Order Receipts

Defect 1517559: When you entered multiple receipts with different receipt dates and valid exchange rates existed for those dates, Costpoint used an incorrect exchange rate for the calculations of the receipt amounts.

Defect 1528407: When you received and accepted into stock a part and lot number, and that same part and lot was quantity adjusted into inventory, you encountered an error.

Sales Order Entry » Import Sales Orders

Defect 1523009: When you imported a sales order (SO) with zero-precision currency, Costpoint populated the tax with decimals. When you entered the SO line from the screen, the tax was rounded to the next whole number.

Sales Order Entry » Manage Invoices

Defect 1526895: You encountered a sales order (SO) Decimal Precision error when you added tax to Zero Precision Currency.

Sales Order Entry » Manage Sales Orders

Defect 1523724: When you entered a sales order (SO) with a 13-month recurring cycle, you encountered an SO currency decimal precision error.

People

Payroll » Create ACH Bank File

Defect 1509223: When you attempted to create the ACH file for multiple taxable entities, both the report and generated file only included the first taxable entity.

Payroll » Export Payroll Taxes

Defect 1516303: When two local tax codes were assigned to the same tax service code, the second locality tax was not included in the file. This issue affects you if you use the Ceridian Tax Service and have multiple tax locales.

Planning

Organization Budgeting » Compute Forward Rates

Defect 1521642: Pools that had costs but no base posted to just the credit account, creating one-sided entries.

Project Budgeting » Direct Project Cost Categories

Defect 1530286: When the Level 2 funding rolled up to Level 1, the funding amount doubled.

Resource Planning » Budget by Resource

Defect 1526915: You were unable to edit the last period.

Projects

Billing » Print Progress Payment Bills

Defect 1533492: Form 1443 (Contractor's Request for Progress Payment) printed by this application already expired. It should have been updated to the latest version with an expiration date of August 31, 2024.

Cost and Revenue Processing » Process Organization Changes

Defect 1503910: When you processed an organization change for a project that bills in a currency different from the functional currency, the organization change ignored the transactional amount. The transactional amount was being populated with the functional amount even if the transactional and functional currencies are different.

Project Inquiry and Reporting » Print Revenue Worksheet

Defect 1519295: Performance tuning has been performed for Print Revenue Worksheet to decrease the application's runtime.

Time & Expense

Time » Manage Timesheets

Defect 1522459: Users who deleted a logged Start entry found that the action not only cleared the hours related to that charge, but also hours for any charges on that day that did not count toward Start/Stop.

Time » Manage/Approve Timesheets

Defect 1534125: When you printed a timesheet report containing 120 or more records, a critical system error occurred.

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