Deltek

Deltek Costpoint® Enterprise

November 2020 Release Notes

(Costpoint MR Version 8.0.3)

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Contents

Overview

This document is a compilation of Costpoint, Costpoint Planning, and Time & Expense enhancements and software defect resolutions for November 2020 (Maintenance Release 8.0.3).

Defects and enhancements described in this document will be applied to the Cloud in mid- November. Refer to messaging on your Cloud Portal page for details.

Enhancements

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

Regulatory Enhancements

Federal

2020 W-2 Update: 2019 USERRA Make-Up Amounts in Box 12 Lookup

This Costpoint release adds the following codes to the lookup list in the Box 12 subtask of the Manage W-2s (PRMW2) screen:

Box 12 Code	Box 12 Description
AA 19	USERRA 2019 make up designated Roth contributions to a section 401(k) plan
BB 19	USERRA 2019 make up designated Roth contributions under a section 403(b) salary reduction agreement
D 19	USERRA 2019 make up elective deferrals to a section 401(k) cash or deferred arrangement
E 19	USERRA 2019 make up elective deferrals to a section 403(b) salary reduction agreement
EE 19	USERRA 2019 make up designated Roth contributions under a section 457(b) plan
F 19	USERRA 2019 make up elective deferrals to a section 408(k)(6) salary reduction agreement
G 19	USERRA 2019 make up elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred comp plan
H 19	USERRA 2019 make up elective deferrals under a section 501(c)(18)(D) tax-exempt organization plan
S 19	USERRA 2019 make up employee salary reduction contributions under a section 408(p) SIMPLE plan
Y 19	USERRA 2019 make up deferrals under section 409A nonqualified deferred compensation plan

2021 Social Security Wage Limit Update

The 2021 Social Security Taxable Wage Base is **$142,800**. Costpoint now supports this new limit with an effective date of 01/01/2021.

Form 941 Worksheet 1 Updates

The Internal Revenue Service (IRS) released revised instructions for Form 941, which include changes to Step 3 of Worksheet 1 (Credit for Qualified Sick and Family Leave Wages and the Employee Retention Credit). Employers will need to use the new worksheet to complete their 2020 third quarter 941 reporting.

Worksheet 1. Credit for Qualified Sick and Family Leave Wages and the Employee Retention Credit (July 2020 Revision)

Step 3.		**Figure the employee retention credit**				
	3a	Qualified wages (excluding qualified health plan expenses) for the employee retention credit (Form 941, Part 3, line 21)	3a	________		
	3b	Qualified health plan expenses allocable to qualified wages for the employee retention credit (Form 941, Part 3, line 22)	3b	________		
	3c	Add lines 3a and 3b	3c	________		
	3d	**Retention credit.** Multiply line 3c by 50% (0.50)			3d	________
	3e	Enter the amount of the employer share of social security tax from Step 1, line 1l	3e	________		
	3f	Enter the amount of the nonrefundable portion of the credit for qualified sick and family leave wages from Step 2, line 2j	3f	________		
	3g	Subtract line 3f from line 3e	3g	________		
	3h	**Nonrefundable portion of employee retention credit.** Enter the smaller of line 3d or line 3g. Enter this amount on Form 941, Part 1, line 11c			3h	________
	3i	**Refundable portion of employee retention credit.** Subtract line 3h from line 3d and enter this amount on Form 941, Part 1, line 13d			3i	________

Costpoint Solution

To comply with the revised Form 941, this Costpoint release updates the numbering and text in the Employee Retention Credit section of the Federal 941 Data and Tax Credit Report generated on the Print Quarter Federal Payroll Tax Report screen. The following chart provides a mapping of the new IRS worksheet to Costpoint's updated report.

IRS Form 941, Worksheet 1 - Step 3 (July 2020 Revision)	Costpoint's Federal 941 Data and Tax Credit Report
3a Qualified wages (excluding qualified health plan expenses) for the employee credit (Form 941, Part 3, line 21)	3a Qualified wages for the employee retention credit:
3b Qualified health plan expenses allocable to qualified wages for the employee retention credit (Form 941, Part 3, line 22)	3b Qualified health plan expenses allocable to qualified wages for the employee retention credit:
(The existing line 3c has been repurposed in the new IRS worksheet. See below. In order to continue supporting Q2 2020 reporting, we will show this as 3cq2 on the updated report.)	3cq2 Qualified wages paid March 13, 2020 through March 31, 2020 for the employee retention credit (Q2 report only); (Amount should be zero)
(The existing line 3d has been repurposed in the new IRS worksheet. See below. In order to continue supporting Q2 2020 reporting, we will show this as 3dq2 on the updated report.)	3dq2 Qualified health plan expenses allocable to qualified wages paid March 13, 2020 through March 31, 2020 (Q2 report only); (Amount should be zero)
3c Add lines 3a and 3b	3c Total qualified wages for employee retention credit (3a + 3b + 3cq2 + 3dq2):

IRS Form 941, Worksheet 1 - Step 3 (July 2020 Revision)	Costpoint's Federal 941 Data and Tax Credit Report
3d **Retention credit.** Multiply line 3c by 50% (0.50)	3d Retention credit (3c x 50%):
3e Enter the amount of the employer share of social security tax from Step 1, line 1l	1l (from the 'Credit for Sick and Family Leave Wages' section of the report) Employer share of social security tax remaining:
3f Enter the amount of the nonrefundable portion of the credit for qualified sick and family leave wages from Step 2, line 2j	2j (from the 'Credit for Sick and Family Leave Wages' section of the report) Nonrefundable portion of credit for qualified sick and family leave wages (the smaller of 1l or 2i):
3g Subtract line 3f from line 3e	3g Subtract nonrefundable portion of credit for qualified sick and family leave wages from employer share of social security tax (1l - 2j):
3h **Nonrefundable portion of employee retention credit.** Enter the smaller of line 3d or line 3g. Enter this amount on Form 941, Part 1, line 11c	3h Nonrefundable portion of employee retention credit (the smaller of 3d or 3g):
3i **Refundable portion of employee retention credit.** Subtract line 3h from line 3d and enter this amount on Form 941, Part 1, line 13d	3i Refundable portion of employee retention credit (3d - 3h):

Reporting COVID-19 Sick Leave Wages and Family Leave Wages in W-2

Description

IRS Notice 2020-54 (Guidance on Reporting Qualified Sick Leave Wages and Qualified Family Leave Wages Paid Pursuant to the Families First Coronavirus Response Act)

Source: https://www.irs.gov/pub/irs-drop/n-20-54.pdf

Reporting Qualified Sick Leave Wages

In addition to including qualified sick leave wages in the amount of wages paid to the employee reported in Boxes 1, 3 (up to the social security wage base), and 5 of Form W-2, employers must report to the employee the following type and amount of the wages that were paid, with each amount separately reported either in Box 14 of Form W-2 or on a separate statement:

- the total amount of qualified sick leave wages paid to the quarantined employee under the EPSLA; in labeling this amount, the employer must use the following, or similar, language: "sick leave wages subject to the $511 per day limit."
- the total amount of qualified sick leave wages paid to the employee caring for quarantined individuals and others under the EPSLA; in labeling this amount, the employer must use the following or similar language: "sick leave wages subject to the $200 per day limit."

If a separate statement is provided and the employee receives a paper Form W-2, then the statement must be included with the Form W-2 provided to the employee, and if the employee receives an electronic

Form W-2, then the statement shall be provided in the same manner and at the same time as the Form W-2.

Reporting Qualified Family Leave Wages

In addition to including qualified family leave wages in the amount of wages paid to the employee reported in Boxes 1, 3 (up to the social security wage base), and 5 of Form W-, employers must separately report to the employee the following type and amount of the wages that were paid in either in Box 14 of Form W-2 or on a separate statement:

- the total amount of qualified family leave wages paid to the employee under the EFMLEA; in labeling this amount, the employer must use the following, or similar, language: “emergency family leave wages.”

If a separate statement is provided and the employee receives a paper Form W-2, then the statement must be included with the Form W-2 sent to the employee, and if the employee receives an electronic Form W-2, then the statement shall be provided in the same manner and at the same time as the Form W-2.

Model Language for Employee Instructions

As part of the Instructions for Employee, under the instructions for Box 14, for the Forms W-2, or in a separate statement sent to the employee, the employer may provide additional information about qualified sick leave wages and qualified family leave wages and explain that these wages may limit the amount of the qualified sick leave equivalent or qualified family leave equivalent credits to which the employee may be entitled with 9 respect to any self-employment income. The following model language (modified as necessary) may be used:

“Included in Box 14, if applicable, are amounts paid to you as qualified sick leave wages or qualified family leave wages under the Families First Coronavirus Response Act. Specifically, up to three types of paid qualified sick leave wages or qualified family leave wages are reported in Box 14:

- *Sick leave wages subject to the $511 per day limit because of care you required;*
- *Sick leave wages subject to the $200 per day limit because of care you provided to another; and*
- *Emergency family leave wages.*

If you have self-employment income in addition to wages paid by your employer, and you intend to claim any qualified sick leave or qualified family leave equivalent credits, you must report the qualified sick leave or qualified family leave wages on Form 7202, Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals, included with your income tax return and reduce (but not below zero) any qualified sick leave or qualified family leave equivalent credits by the amount of these qualified leave wages. If you have self employment income, you should refer to the instructions for your individual income tax return for more information.”

Costpoint Solution

Manage Employee Leave (LDMELV)

When you report the COVID-19 sick leave wages in Box 14 of Form W-2, the sick leave wages must be reported based on the daily limit that was applied:

- Sick leave wages subject to the $511 per day limit
- Sick leave wages subject to the $200 per day limit

To allow you to specify which daily limit was utilized, the Manage Employee Leave screen provides the following new drop-down list in the Paid Family Leave subtask. This will enable the Create W-2 Table application to appropriately allocate wages to the correct category.

Field	Description
Box 14 Description	From the drop-down list, select the Box 14 description for the daily limit amount to which the sick leave wages have been subjected. The **Box 14 Description** drop-down box will only be enabled and required if the **City/State** field value is **NATIONAL PAID SICK LEAVE COVID19**.

A new **EMERGENCY FAMILY MEDICAL LEAVE COVID19** value was added in the **City/State** field for the FFCRA's EFMLEA provision. This new value is different from the existing **NATIONAL PAID SICK LEAVE COVID19** value, which is for the FFCRA's EPSLA provision.

Create W-2 Table (PRPCW2)

The application now generates Box 14 records for any employees with the following types of COVID-19 leave wages:

- Sick leave wages subject to the $511 per day limit
- Sick leave wages subject to the $200 per day limit
- Emergency family leave wages

Manage W-2s (PRMW2)

A new subtask, titled COVID-19 Box 14, allows you to view and edit Box 14 information for the following types of COVID-19 leave wages:

- Sick leave wages subject to the $511 per day limit
- Sick leave wages subject to the $200 per day limit
- Emergency family leave wages

The subtask provides the following fields:

Field	Description
Sick leave wages paid to the quarantined Employee	▪ **Description**: Enter a description for the total amount of sick leave wages subject to the $511 per day limit. This will be used as the Box 14 description of the total amount of qualified sick leave wages paid to the quarantined employee under the EPSLA. The default description in this field is **Sick leave subject to $511/day limit**. According to the IRS, in labeling this amount, the employer must use the following, or similar, language: "sick leave wages subject to the $511 per day limit." ▪ **Amount**: Enter the total amount of qualified sick leave wages paid to the quarantined employee under the EPSLA.
Sick leave wages paid to the Employee caring for others	▪ **Description**: Enter a description for the total amount of sick leave wages subject to the $200 per day limit. This will be used as the Box 14 description of the total amount of qualified sick leave wages paid to the employee caring for others under the EPSLA. The default description in this field is **Sick leave subject to $200/day limit**.

Field	Description
	According to the IRS, in labeling this amount, the employer must use the following, or similar, language: "sick leave wages subject to the $200 per day limit." ▪ **Amount**: Enter the total amount of qualified sick leave wages paid to the employee caring for others under the EPSLA.
Family leave wages paid to the Employee	▪ **Description**: Enter a description for the total amount of family leave wages paid to the employee under the EFMLEA. This will be used as the Box 14 description of the total amount of qualified family leave wages paid to the employee under the EFMLEA. The default description in this field is **Emergency family leave wages**. According to the IRS, in labeling this amount, the employer must use the following, or similar, language: "emergency family leave wages." ▪ **Amount**: Enter the total amount of qualified family leave wages paid to the employee under the EFMLEA.

Print W-2s (PRRW2)

If an employee has COVID-19 sick leave of family leave wages in 2020, the information will print in Box 14 on a separate W-2 for the employee.

The W-2 Box 14 COVID-19 sick and family leave wages was added to the report.

Print W-2 Summary Report (PRRW2R)

The application now prints Box 14 summary information for the following types of COVID-19 leave wages:

- Sick leave wages subject to the $511 per day limit
- Sick leave wages subject to the $200 per day limit
- Emergency family leave wages

W-2s (ESMELECW2)

The application now provides the ability to view and print Box 14 information for the following types of COVID-19 leave wages:

- Sick leave wages subject to the $511 per day limit
- Sick leave wages subject to the $200 per day limit
- Emergency family leave wages

In order to accommodate the Box 14 COVID-19 reporting, the existing Box 14 (Other) fields on the main screen have been replaced with a Box 14 Code table. The Box 14 Code table provides the following fields:

Field	Description
14 Code	This field displays the deduction code or local taxes assigned to lines 1–5.
14 Amount	This field displays the corresponding amount for the deduction code or local tax.

Export Payroll Taxes (PRPEXTAX)

The application process now includes the three types of COVID-19 leave wages in the W-2 File and the Export Payroll Taxes report, if applicable.

Print Data Dictionary Report (SYRDD)

The report now provides information for the new BOX14_DESC column in the EMPL_LV_ACCRL_PAID_FAM_LV table.

The report now provides information for the following new columns on the FED_W2_FILE table for the three types of leave wages:

- BOX14_CVD_SL1_CD
- BOX14_CVD_SL2_CD
- BOX14_CVD_FML_CD
- BOX14_CVD_SL1_AMT
- BOX14_CVD_SL2_AMT
- BOX14_CVD_FML_AMT

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 patches dbc_800_10357 and dbc_800_10365.

Arkansas

The SUTA limit for 2021 is **$10,000**.

Missouri

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

Montana

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

New York State

The SUTA limit for 2021 is **$11,800**.

Oklahoma

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

Vermont

The SUTA limit for 2021 is **$14,100**.

Wyoming

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

Documentation

Release Notes Link on the Help Menu

You can now directly access a list of all Costpoint 8.0.x Release Notes from the Help menu. On Costpoint's main page or on any open screen, click **Help** on the global menu, and then select **Release Notes Landing Page**.

People

2020 Affordable Care Act (ACA) Updates

The IRS released the updated Form 1095-C, which included the following updates:

- "Employee's Age on January 1" was added in Part II.
- "Zip Code" was added in Part II, line 17.
  - Line 17 is for reporting the applicable ZIP code that the employer used for determining affordability if the employee was offered an individual coverage health-reimbursement arrangement.
  - If Code 1L, 1M, or 1N were used on line 14, then this ZIP code will be the employee's primary residence location.
  - If Code 1O, 1P, or 1Q were used on line 14, then this ZIP code will be the employee's primary work location.
- Part III starts at line 18 instead of line 17 in 2019.
- Part III ends at line 30 instead of line 34 in 2019
- New codes related to Health Reimbursement Arrangements (HRA) were added for use in Line 14 (1L, 1M, 1N, 1O, 1P, 1Q, 1R, and 1S).

For reporting offers of coverage for 2020, an ALE Member relying on the multiemployer arrangement interim guidance should enter code 1H on line 14 for any month for which the ALE Member enters code 2E on line 16 (indicating that the ALE Member was required to contribute to a multiemployer plan on behalf of the employee for that month and, therefore, is eligible for multiemployer interim rule relief). A warning validation was added in Costpoint for this requirement.

A validation was also added in Costpoint to require a value in the **Employee's Age on January 1** field if one of the codes in Line 14 is an HRA code.

In addition to these Costpoint updates, this release applies changes to multiple screens to support the updated Form 1095-C.

Manage 1095-C Data (HBM1095C)

The application provides the following new fields:

Field	Description
Employee's Age on January 1	Enter the age of the employee as of January 1st of the filing year. You must enter an age if the employee was offered an individual coverage HRA.
ZIP Code – All 12 Months (column/data field)	If the employee was offered an individual coverage health-reimbursement arrangement, enter the applicable ZIP code that the employer used for determining affordability. This field must only be populated if the same ZIP code applies to the employee for the entire calendar year. If more than one ZIP code applies during the calendar year, leave this field blank. If code **1L**, **1M**, or **1N** were used on line 14, this will be the employee's primary residence location. If code **1O**, **1P**, or **1Q** were used on Line 14, this will be the employee's primary work location.
ZIP Code– Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec (column/data field)	If the employee was offered an individual coverage health-reimbursement arrangement, enter the applicable ZIP code that the employer used for determining affordability, which applies to the specific month. This field must only be populated if the same ZIP code does not apply to the employee for the entire calendar year. If the same ZIP code applies during the entire calendar year, leave this field blank. If code **1L**, **1M**, or **1N** were used on line 14, this will be the employee's primary residence location. If code **1O**, **1P**, or **1Q** were used on line 14, this will be the employee's primary work location.

The application now allows you to select the following new codes in the lookup of **Offer of Coverage** fields (All 12 Months; Jan–Dec):

- **1L**: Individual coverage health reimbursement arrangement (HRA) offered to you only with affordability determined by using employee's primary residence location ZIP Code
- **1M**: Individual coverage HRA offered to you and dependent(s) (not spouse) with affordability determined by using employee's primary residence location ZIP Code
- **1N**: Individual coverage HRA offered to you, spouse, and dependent(s) with affordability determined by using employee's primary residence location ZIP Code

- **1O**: Individual coverage HRA offered to you only using the employee's primary employment site ZIP Code affordability safe harbor
- **1P**: Individual coverage HRA offered to you and dependent(s) (not spouse) using the employee's primary employment site ZIP Code affordability safe harbor
- **1Q**: Individual coverage HRA offered to you, spouse, and dependent(s) using the employee's primary employment site ZIP Code affordability safe harbor
- **1R**: Individual coverage HRA that is NOT affordable offered to you; employee and spouse or dependent(s); or employee, spouse, and dependents
- **1S**: Individual coverage HRA offered to an individual who was not a full-time employee

Create 1094-C and 1095-C Data (HBP109XC)

The application process now includes the **Employee's Age on January 1** field.

Print 1095-Cs (HBR1095C)

The application adds the following changes in the report:

- The employee's age and ZIP code fields was added in Part II.
- Part III is now displayed on page 3. Part III starts at line 18 up to line 30 only.
- The employee name and SSN was removed from page 3.

The text, "(More than 6 dependents)," was removed from the label for the 1095-C **Page 2** option since it is no longer applicable.

Print Data Dictionary Report (SYRDD)

The report for the HB_1095C_DATA table now provides information for the new columns for age and ZIP codes.

Reports & Analytics

Costpoint and Costpoint BI Timeout

An extension is now available that will let you continuously work on Costpoint Business Intelligence and not receive the notification for the Costpoint timeout. With this extension, Costpoint recognizes that you are actively working while a Costpoint BI session is taking place, hence, avoiding loss of work.

The instructions in installing the extension is included in the installation guides for Costpoint Business Intelligence 8.0.3.

Costpoint BI 8.0.3 with Cognos Analytics 11.1.7 FP1

Costpoint Business Intelligence 8.0.3 leverages Cognos Analytics 11.1.7 FP1. To know more about the new features of this and other versions of Cognos Analytics, see the IBM website.

MO Production Status Drill-Thru Report

Additional information is now available on the MO Production Status Drill-Thru report on the Manufacturing Dashboard. These new additions will let you see the order status and lead time of the MO Build Part on the report. The additional information are:

- MO Production Status that includes:

- Firmed
- Released
- In-Shop
- Planned
- MO Build Part ID and Revision
- Build Part Lead Time

Organization Filter on the PO Commitments Detail Report

You can now select multiple organizations when you run the PO Commitments Detail Report in Procurement. The Organization filter is now available on the prompt page.

PO_LN_DEL_SCH Table in the Procurement Model

The PO_LN_DEL_SCH table is now available in the Procurement model under the **Procurement » Purchasing » Purchase Order Line** section.

Purchase Order Amount by Status Drill-Thru

The Purchase Order Amount by Status, a new drill-thru report, is now available for BI Procurement users on the Procurement Dashboard. You can view this drill-thru report from the PO Status Chart.

The drill-thru report is grouped by vendor with the corresponding number of purchase orders, including the total amount per PO. A hyperlink is displayed that directs you to the PO report.

Purchase Order Report Enhancements

For BI Procurement users, there are several enhancements made on the Purchase Order report:

- The addition of the purchase order line delivery schedule.
- The ability to select multiple purchase order (PO) types when you run the Purchase Order Report. The PO type selections are:
  - Subcontractor Agreement
  - Blanket Order
  - Subcontractor Agreement Blanket
  - Subcontractor Agreement Release
  - Purchase Order
  - Release Order
  - Subcontract Retainage PO
  - GFM/GFE Order

Purchase Order Type on the Procurement Dashboard

You can now select a Purchase Order Type on the Procurement Dashboard. A PO Type filter is now available on the Purchasing tab of the Procurement Dashboard.

Requisitions Pending Report Renamed as Requisitions Pending PO Conversion

To be more descriptive of the purpose of the report, the formerly known Requisitions Pending report is now called the Requisitions Pending PO Conversion report.

Requisitions Report and Approved Requisitions Drill-Thru

The following information are now available for Costpoint BI Procurement users who run the Requisitions Report and Approved Requisitions Drill-Thru:

- Approval Name
- Approval Date

Time and Expense

Restrictions for ICR Processing

For Costpoint GovCon Cloud environments, **Allow ICR Expense Processing** on the Miscellaneous tab of **General Controls » General Settings** is automatically disabled due to the increased security in this environment. When the setting is disabled, users who capture receipts in Mobile Expense or upload receipts in the My Outstanding Expenses application will not have the image processed via ICR processing.

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 PO Vouchers from POs/Receipts

Defect 1352144: When you created a purchase order (PO) voucher from a PO/receipt with a 0 **PO Total Amount**, Costpoint interchanged the accounts payable (AP) account assigned to the PO/receipt that has a **PO Total Amount** of 0 with the AP account assigned to the succeeding PO/receipt that has a **PO Total Amount** that is not 0.

Accounts Payable » Manage Purchase Order Vouchers

Defect 1370146: When you entered a voucher for a purchase order (PO) with a line that has the **Taxable** drop-down list set to **No**, Costpoint incorrectly updated the **Invoice Unit Cost**. This happened when you manually entered the PO details, updated the exchange rates, and clicked **Save**.

Accounts Payable » Post Vouchers

Defect 1372687: If you use Costpoint with an Oracle database, Costpoint abruptly stopped functioning when you posted vouchers with vendor labor lines.

General Ledger » Create Purchase Order Accruals

Defect 1365767: You encountered an error when you created purchase order accruals. This happened when the **Use PO/Voucher Organizations** check box was selected on the Configure Purchase Order Accruals screen. As a workaround, clear the **Use PO/Voucher Organizations** check box before creating purchase order accruals.

Multicurrency » Update Open Accounts Payable Exchange Rates

Defect 1368543: The Update Open Accounts Payable Exchange Rates screen was updated to disable parallel execution so the update process will run in a serial queue even if you run it using a parallel queue.

Multicurrency » Update Open Accounts Receivable Exchange Rates

Defect 1368515: The Update Open Accounts Receivable Exchange Rates screen was updated to disable parallel execution so the process will run in a serial queue even if you run it using a parallel queue.

Contracts

Contracts » Manage Contracts

Defect 1358716: When you copied data from Excel and pasted them into the FAR Clauses/Provisions subtask, the copied data changed after you saved the record.

Defect 1358719: On the Modifications tab, the fee calculations at the roll-up level were different from the calculations on the individual modifications.

Contracts » Manage Subcontracts

Defect 1373424: **Subcontractor Administrator Name** was not included in the list of options/fields that you can do a search on the Query dialog box.

Resources » Manage Contract Management Customer Info

Defect 1369888: An error occurred while saving a cloned approved prospective customer when there were edits to the record in Manage Customers before the clone was made. As a workaround, you can create a record instead of cloning an existing one.

Resources » Manage Contract Management Vendor Info

Defect 1354325: A system error occurred when cloning an approved prospective vendor with edits made on the Addresses and Contacts subtasks of Manage Vendors. This defect affects you if you use an Oracle database. As a workaround, you can create a new record instead of cloning an existing one.

Defect 1369769: An error occurred while saving a cloned approved prospective vendor when there were edits to the record before the clone was made. As a workaround, you can create a new record instead of cloning an existing one.

Framework

Change in Behavior

Defect 1366560: When you added an extensibility field as one of your query conditions in an application, the defined sort order on the Sort tab no longer applied.

Defect 1367191: After upgrading to Costpoint 8, extensions successfully ran the first time. The second invocation failed with a critical system error.

External Tools » CONFIG

Defect 1370185: When using the Costpoint Config Utility, the **Test** button for each System (DB segments and Link Users) should have validated the password to make sure it did not contain unsupported characters before it tested the connection. As a workaround, you can manually change the passwords in the toolconnections.properties file for each segment and save the file. Then, open the Config utility, test the system, and click **Save**. This should encrypt the file again.

Framework

Defect 1346673: When you viewed timesheets in Portrait mode using the Blackberry Access browser on your mobile phone and rotated the phone in Landscape mode, you could not scroll to view the page because the right edge of the timesheet was cut off. As a workaround, you can refresh the page.

Defect 1358066: If a Manage Application/Content Links (SYMCMIAL) record was set to report property mismatches, sometimes a false report like the following may display for numeric metadata values:

"Costpoint Field 'Rlse' Value: 0 <>Content Property 'PO RLSE' Value: 0."

Defect 1362616: Web Service Integration Console: You received General Framework errors in data export web services that tried to limit data by the LAST_MODIFIED pseudo column. The error stack showed nulls preceded by "Caused by: Timestamp format must be yyyy-mm-dd hh:mm:ss[.fffffffff]".

Defect 1363687: Time & Expense 10 displayed the desktop view instead of the mobile view on a mobile device.

Defect 1377520: In the Manage Timesheets (LDMTIME) application, the **Comment** icon on the timesheet line was not visible in Google Chrome version 86.

Runtime » Client

Defect 1358495: When you opened Costpoint on a smartphone in Portrait view and then switched to Landscape view, the text field overlapped the label in various applications. As a workaround, you can close the application and reopen it in the preferred view.

Runtime » Server

Defect 1354230: The Approval Workflow sent notifications to all the Employee Managers built-in roles in all the Salary Info records for an employee, instead of sending a notification only to the Employee Manager in the most recent Salary Info record.

Defect 1361315: Costpoint needed to support multiselect controls in Web Services.

Defect 1374244: You encountered an intermittent error when saving timesheets on the Timesheet (TMMTIMESHEET) screen.

Materials

Inventory » Create Physical Count Adjustments

Defect 1365769: When you used the Create Physical Count Adjustment process, the ORG_ID column was not populated. This resulted in transaction lines/records that did not display, which prevented you from reviewing the adjustments.

Material Requirements Planning » Manage Detailed Part Schedule

Defect 1359821: The application displayed only the requisition line date rather than the corresponding delivery schedule lines.

Defect 1368169: When you updated Material Requirements Planning (MRP) and queried the part in Manage Detailed Part Schedule, the Borrow/Payback Reservation displayed incorrectly.

Material Requirements Planning » Update Material Requirements Plan

Defect 1354345: Material Requirements Planning (MRP) randomly assigned purchase order (PO) lines having the same Part/Revision, Due Date, and Inventory Abbreviation to a demand.

Defect 1364807: 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.

Procurement Planning » Apply PO Info to Purchase Requisitions By Line

Defect 1362416: When you entered a Project Labor Category (PLC) on the Resources subtask and verifed the PLC description, Costpoint displayed an incorrect PLC description.

Procurement Planning » Create Purchase Orders

Defect 1348712: When you modified multiple purchase orders (POs) and you didn't have organization security rights to one of the POs, PO_HDR.LOCK_FL was set to **Y**, which locked the PO.

Procurement Planning » Manage Purchase Requisitions

Defect 1361295: When you changed the unit of measure (UM) to EA (each), Costpoint displayed an incorrect entry in ON-RQ QTY.

Defect 1362406: When you entered a Project Labor Category (PLC) on the Resources subtask and verifed the PLC description, Costpoint displayed an incorrect PLC description.

Production Control » Enter Manufacturing Order Issues

Defect 1361297: When you created a manufacturing order (MO), assigned inventory allocations to the MO, reloaded the requirements, and reassigned the allocations, the requirements did not autoload upon release of the MO to the Enter Manufacturing Order Issues screen.

Purchasing » Manage Purchase Orders

Defect 1356487: Costpoint used the Project Labor Category (PLC) description from the BILL_LAB_CAT.BILL_LAB_CAT_DESC table instead of using the value from the PROJ_LAB_CAT.BILL_LAB_CAT_DESC table.

Purchasing » Print Purchase Orders

Defect 1352135: When a purchase order (PO) had different Ship IDs for each line, the Ship ID address was not printed on PO line 1 but was printed on the remaining lines.

Defect 1364818: When you printed the purchase order (PO), the Due Date and Desired Date values overlapped on the printed report.

Receiving » Manage Vendor Returns

Defect 1373059: When running in the Web Integration Console (WIC), the application did not get the TRN_QTY value from the XML, and the value was set to 0.

People

Employee » Manage Employee HSA Elections

Defect 1350505: The application did not allow an election amount that fell below the minimum amount even if the election amount was equal to the YTD total.

This issue also affected the following applications:

Affected Applications	Defect No.
Manage Employee Dependent Care FSA Elections	1350503

Affected Applications	Defect No.
Manage Employee Medical Care FSA Elections	1350501

Employee » Manage Employee Taxes

Defect 1355229: 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 - Filing 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.

Labor » Delete Recasted Overtime Premium from Timesheet Lines

Defect 1362635: The application should not delete recast-generated timesheet lines for N-type timesheets. This issue affects you if you need to perform the following:

1. Use Costpoint's recast functionality.
2. Use the Manage Correcting Timesheets application to alter overtime timesheet lines that have been recasted.
3. Rerun the recast process on the D-type timesheet.

Leave » Close Leave Year

Defect 1360645: The screen should provide a check box which lets you know that you must post your timesheets for the final leave period prior to closing the leave year.

Planning

Administration » Refresh Process

Defect 1348246: During the refresh process, Project Labor Categories (SRC01_PROCESS_013A_BUILD_CUR_PROJ_SUM) took up to twelve hours to execute.

Defect 1348250: During the refresh process, Project Labor Categories (SRC01_PROCESS_BUILD_EPROJ_LAB_CAT_RT_SC) took up to five hours to execute.

Defect 1367208: REFRESH – CER scripts misidentified projects requiring updates. This caused slowdowns and conflicts in scheduling job runs, which contributed to difficulties entering EACs if refreshes instead had to run during the day.

Defect 1374160: During refresh, the EREPORT table encountered performance issues.

New Business Budgeting » New Business Budgets

Defect 1363970: You were unable to clone PLCs unless at least one PLC already existed in the project.

Defect 1370593: Autofill functionality did not work when you manually entered values into a field instead of selecting those values from a list.

Defect 1372178: A VW_AUTH_NB was created for authorized users of New Business Budgets.

Organization Budgeting » Create Top Level Outlook

Defect 1381744: Non-labor actuals were incorrectly summarized in the top level outlook.

Organization Budgeting » Organization Budgets / Outlooks

Defect 1349602: The application doubled holiday data, which affected rate and revenue projections.

Defect 1363838: When you entered both actual labor costs and forecasted labor dollars in different sheets on the same outlook for the same account ID, duplicates records were created when you ran the Actual Merge process in Outlooks.

Defect 1364989: 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.

Defect 1370589: Autofill functionality did not work when you manually entered values into a field instead of selecting those values from a list.

Project Budgeting » Project Budgets / EACs

Defect 1363968: You were unable to clone PLCs unless at least one PLC already existed in the project.

Projects

Billing » Calculate Standard Bills

Defect 1381398: A critical system error occurred when unit transactions included in the calculation contain both contract line item number (CLIN) and catalog values.

Cost and Revenue Processing » Build Rate Application Table

Defect 1360676: A critical system error occurred when you ran this application.

Cost and Revenue Processing » Compute Burden Costs

Defect 1357699: The application did not compute burden for those transactions that are in subperiod 2 or higher and do not have any previous transaction for the same account/organization. As a workaround, set the **Accounting Periods** option to **One** and process records per subperiod.

Inter-Company Work Orders » Create IWO Allocations

Defect 1364962: When the tax rate was 0 (that is, the rate was zero and no tax was charged), the sales tax code did not flow to the receiving company with the 0 dollar charge.

Inter-Company Work Orders » Manage IWO Projects

Defect 1356993: A system error occurred when you entered a value in the **Destination Sales/VAT Tax** line in the IWO Posting Accounts table window and tried to save the record.

Inter-Company Work Orders » Post IWO Journal

Defect 1364968: When the tax rate was 0 (that is, the rate was zero and no tax was charged), the sales tax code did not flow to the receiving company with the 0 dollar charge.

Project Inquiry and Reporting » Create Project Report Tables

Defect 1338760: Revenue summary was not bringing prior year revenue into the RPT_REV_SUM table when you only have labor transactions (without burden) with a revenue formula of Loaded Labor Plus Non-labor Plus Burden on Non-labor.

Project Inquiry and Reporting » Print Revenue Worksheet

Defect 1344405: This application has been updated to reduce its runtime when printing the Revenue Worksheet for all projects.

Project Inquiry and Reporting » Update Project Status Report Tables

Defect 1358723: When you ran this application for all projects, Costpoint did not populate the PSR_HDR table with inception-to-date billed and open accounts receivable amounts. As a workaround, you can run this screen for only one project or for a range of projects.

Project Setup » Import Project Master Data

Defect 1351318: There was an error in ACRN mapping when you imported a PROJ_WAWF_INFO file even if there is a project in Manage ACRN Bills with **Billing Requirement** set to **ACRN/Line Item with Mapping**. The following was displayed on the error report: For ACRN mapping, project must be set up with ACRN line item mapping.

As a workaround, you can enter information on the Manage Project iRAPT Information screen.

Project Setup » Mass Add Project Master Data

Defect 1342330: The application allowed you to add a project with an incorrect length.

Defect 1354330: The application was not bringing in data from the Assign PLC to Employee Work Force subtask of the Manage Employee Work Force screen. When you used an existing project on the destination project, the application skipped the employee work force (including the PLC). This issue does not exist when mass adding information to a new project.

Project Setup » Print Project Revenue and Billing Formulas

Defect 1361225: This application printed projects from different companies when the organization security was on and the user had full rights to all organizations in the company.

As a workaround, you can try any of the following options:

- Run this screen with the **Project** range set to **One** for each project.
- Turn off organization security in your system.
- Modify organization security settings for the user:
  1. On the Manage Organization Security Profiles screen, select the **Apply Org Security** check box for the user's organization security profile.
  2. In the Assign Organizations to Profile table window, specify organizations with the appropriate **Rights** option selected (**Full** or **None**).
  3. Run the Update Organization Security Profiles screen.
  4. Log out of Costpoint, and then log in.

Subcontractor Management » Approve Subcontractor Invoices

Defect 1363016: There was no validation when you approved an invoice with taxable items but the tax code was blank. Fields in the **Tax Info** group box were also disabled.

Subcontractor Management » Create Subcontractor Invoices

Defect 1348137: Accounts payable (AP) and cash accounts were not properly set based on vendor. As a workaround, you can manually edit the AP and cash accounts on the Manage Purchase Order Vouchers screen.

Subcontractor Management » Manage Work Assignments

Defect 1347461: Costpoint used the Project Labor Category (PLC) description from the BILL_LAB_CAT.BILL_LAB_CAT_DESC table instead of using the value from the PROJ_LAB_CAT.BILL_LAB_CAT_DESC table.

Subcontractor Management » Print Subcontractor Invoices

Defect 1358721: Non-labor costs that were printed included current period only for cumulative amounts.

Time and Expense

Configuration » MyDesktop

Defect 1373870: Approval tasks loaded very slowly in MyDesktop.

Expense » Change Expense Report/Advance Status

Defect 1372088: Subcontractor expense records, where invoices had not already been generated, were not removed from Costpoint tables even though **Un-Mark Processed Expense Reports** was the selected action.

Expense » Export ERs / Advances

Defect 1372112: Subcontractor expenses exported to Costpoint did not display in the Manage Open Subcontractor Detail application.

Time » Manage/Approve Timesheets

Defect 1375362: Performance was sluggish after you approved timesheets and refreshed the results set.

Time » Timesheet

Defect 1370619: Supervisors were able to create and enter time for employees who had not been assigned seat licenses.

Defect 1374195: In certain random instances, the Timesheet Lines grid failed to load for some clients.

Known Issues

The following are known issues in this release.

Duplicate Hour Values in Resource Management Dashboard in Costpoint BI

There are duplicate values in the GEN_LAB_CAT_CD which result to hours being doubled on the Resource Management Dashboard. This issue only affects you if you use multiple companies.

Deltek is actively working to resolve the issue.

Drill-Through Reports from Dashboards with Date Filters

The information on dashboards with date filters are not properly passed on to drill-through reports. As a result, the drill-through report may display inaccurate data.

Deltek is actively working on this issue. A case has been submitted to IBM pending resolution.

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

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