Deltek Costpoint® 7.1.1

Cloud Release Notes December 2017

December 2017

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Contents

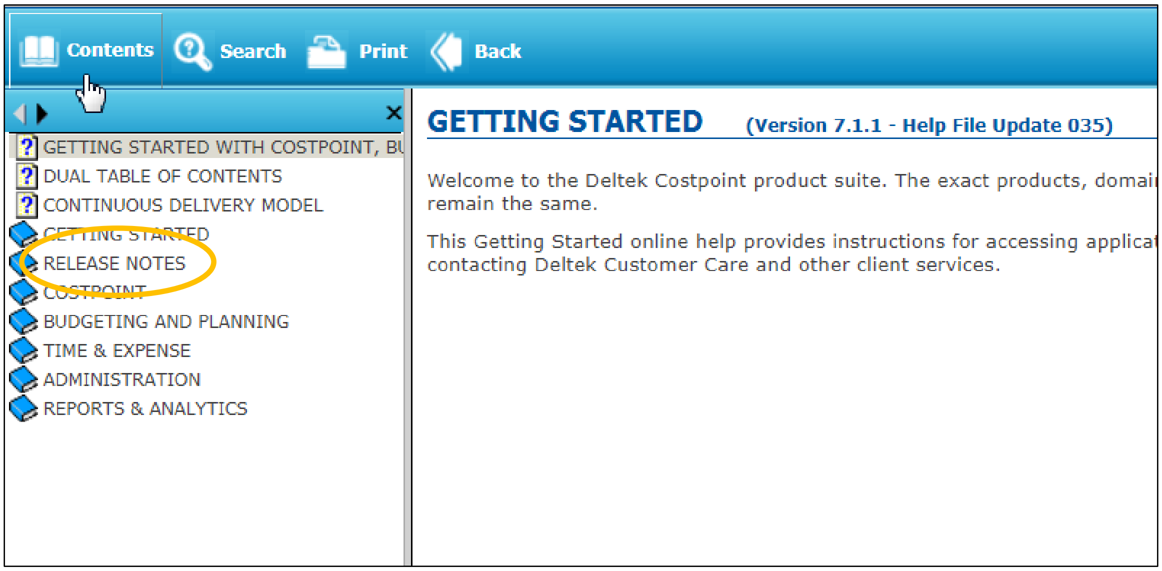
Overview

This document is a compilation of the release notes distributed for the enhancements made in Costpoint, Budgeting and Planning, and Time & Expense and will be installed on the Cloud in December 2017.

Costpoint

Online Help

A new section, Release Notes, was added to the Table of Contents. From this location you can access (with an Internet connection) all related monthly release notes, as well as Costpoint 7.1.1 and Time & Expense 10 overall cumulative enhancements documents.



Accounting

CAGE Code Field on the Manage Vendors Screen

A new field is now available on the Manage Vendors (APMVEND) screen where you can track the CAGE Code of your vendors.

CAGE Code Field in the Import Vendors Report

A new CAGE Code field is now available in the Import Vendors Report where you can view your vendors' CAGE Code.

Projects

There are no changes to this domain for this release.

Contract Management

Vendor and Vendor Employee Validation in Manage Vendors

In support of the future implementation of the Contract Management feature, a new validation was added to the Manage Vendors (APMVEND) application.

The Vendor ID and Vendor Employee IDs in APMVEND are checked to determine if there are duplicates in the Contract Management tables.

This enhancement has no impact on current functionality.

The functionalities of this update/enhancement is not available until the full feature is released.

People/Regulatory

New Employee Days on Configure Benefit Settings

The Configure Benefit Settings screen contains a new field that allows you to specify the number of days that employees are classified as new employees. This setting will be used for benefit election purposes.

Florida Reemployement XML Report Update

The Costpoint Software ID for Florida SUTA electronic filing was updated in this release.

Limited Purpose FSA (Flexible Spending Account) Setting in Employee Self Service

The Configure Self Service screen now provides you the option to display the **Limited Purpose FSA** check box on Medical FSA screens for life events and benefits **enrollment. Limited Purpose FSA check boxes allow you to designate an FSA as limited purpose only which will only reimbu**rse vision and dental expenses.

This enhancement is required for an upcoming Costpoint feature for supporting Evidence of Insurability (EOI). The updates in this release will only function when the rest of the enhancements for the EOI feature are released by 2018.

This particular Costpoint release updates the following screens with the corresponding changes:

- Configure Self Service Settings (ESMESS)
- A new check box, **Show 'Limited Purpose' checkbox**, allows you to display the check boxes for designating a limited purpose FSA on Medical FSA screens.
- Set Up Company (SYPCOMP)

The following new fields were added to tables for company defaults:

- Days that employees are considered new employees (DAYS_NEW)
- Show 'Limited Purpose' flag in Medical FSA (SHOW_LIMIT_FSA_FL)

Calendar Year End Updates

2018 Federal Tax Tables

1. Social Security Limit: $128,400
2. 401(k) Deferral Limit: $18,500
3. 401(k) Wage Limit: $275,000
4. Exemption Amount: $4,150

2017 FUTA Credit Reductions

1. California: 2.1%

2. Virgin Islands: 2.1%

2018 State Tax Tables

1. 2018 Kansas Tax Table Update (to be confirmed)
2. South Carolina
3. Maryland
4. California
5. Maine
6. Minnesota
7. New York

2018 SUTA Wage Base Update

States: AR, IA, NV, WA, NJ, CO, MT, VT, OK, DE, NM, PA, NC, MO, OR, UT, ID

1. Arkansas: $10,000
2. Iowa: $29,900
3. Nevada: $30,500
4. Washington: $47,300
5. New Jersey: $33,700
6. Colorado: $12,600
7. Montana: $32,000
8. Vermont: $17,600
9. Oklahoma: $17,600
10. Delaware: $16,500
11. New Mexico: $24,200
12. Pennsylvania: $10,000
13. North Carolina: $23,500
14. Missouri: $12,500
15. Oregon: $39,300
16. Utah: $34,300
17. Idaho: $38,200
18. Hawaii: $45,900

Federal and State Electronic Filing (EFW2)

A new box 12 Code FF money field, **Permitted Benefits Under a Qualified Small Employer Health Reimbursement Arrangement (Code FF)**, was added to the following records:

- RW Employee Record in positions 474 - 484
- RT Total Record in positions 400 - 414

This release also supports the 39 states that use the standard FW2 format.

- **W-2 Form and USERRA make-up amounts for 2016**

Costpoint now supports the following updates to the W-2 Form:

- **Box 12 Code FF** — A new box 12 Code FF has been added to report the total amount of permitted benefits under a qualified small employer health reimbursement arrangement (QSEHRA).
- **Box 9—Verification code** — If you are participating in the W-2 Verification Code Initiative, enter the appropriate verification code in box 9. Otherwise, leave box 9 blank.

Costpoint now has the ability to report USERRA make-up amounts for 2016. On the Manage W-2s screen, the Box 12 subtask now contains the additional Lookup codes for USERRA 2016.

- **Michigan W-2 Electronic Filing**

  This release includes W-2 electronic filing updates that apply to the state of Michigan.

- **Missouri W-2 Electronic Filing**

This release includes W-2 electronic filing updates that apply to the state of Missouri.

Affordable Care Act 2017

CYE 2017 ACA Form 1094-C / Form 1095-C
Affordable Care Act Electronic Filing (Tax Year 2017)

Several forms of transition relief were available to some employers under section 4980H for 2016. For calendar year 2017 reporting, section 4980H transition relief was removed and Form 1094-C was revised with the following changes:

- Line 22, box C is designated as “Reserved.”
- Part III, column (e) is designated as “Reserved.”
- Entry rows in Part III, column (e) are shaded.

To support Affordable Care Act reporting for calendar year 2017, the following applications were updated in this Costpoint release:

- Create 1094-C and 1095-C Data (HBP109XC) (PBI 845807)
- Create 1094-C and 1095-C Electronic File (HBP1094C) (PBI 844241)
- Manage 1094-C Data (HBM1094C) (PBI 832633)

Import Timesheets with Transaction ID Values

The Import Timesheets screen now has the ability to import the Transaction ID (TRANS_ID) values and populate the **Transaction ID** fields of manufacturing order timesheet lines in Costpoint. This functionality is available when importing files using comma-separated values (CSV) file format.

San Francisco Employer-Funded Paid Parental Leave and New York Paid Family Leave

This release includes updates to support San Francisco Paid Parental Leave Ordinance (PPLO) and New York Paid Family Leave. The following applications were updated to support this enhancement:

- Manage Leave Types (LDMLVTP)
- Manage Leave Codes (LDMLVTAB)
- Manage Employee Leave (LDMELV)
- Compute Leave (LDPCLHF)
- Reconcile Leave Balances (LDPLVREC)

- Apply Timesheet Adjustments in Batch Mode (LDPAUTO)
- Create Retroactive Timesheet Adjustments (LDPRETRO)
- Import Timesheets (AOPUTLTS)
- Import Timesheets from Deltek Time and Expense (LDPUPET)
- Post Labor (LDPLDJ)
- Close Leave Year (LDPLYCLS)

Executive Order 13706, Establishing Paid Sick Leave for Federal Contractors (Add ability to establish limit for YTD Accrued Hours/Amount)

This release includes enhancements to support Executive Order 13706. The following applications were updated to support this enhancement:

- Manage Leave Types (LDMLVTP)
- Manage Leave Codes (LDMLVTAB)
- Compute Leave (LDPCLHF)
- Close Leave Year (LDPLYCLS)

Materials Management

WA250 Output for Packing Slips

With the advent of iRAPT(Invoicing, Receipt, Acceptance, and Property Transfer) the submission of DD250s now occurs electronically, with limited exceptions. You may either use the government's web application or use an iRAPT-automation system to create and submit electronic data interchange (EDI) transactions. iRAPT is the government's web-based system for accepting, processing, and distributing the DD250.

A specialized iRAPT version of the DD250 (WA250) includes distinctive fields that simplify preparation of iRAPT receiving reports, invoices, and combos.

In view of these changes, Costpoint has been updated and new applications have been added to support the printing of WA250 form as an option for users to print the WA250 when they are unable to use the iRAPT but need to electronically submit the DD250.

These new applications, under the Sales Order Entry module, are the Print WA250 Invoices (OERW250) screen (**Materials » Sales Order Entry » Sales Order Invoices » Print WA250 Invoices**) and the Print WA250 Packing Slips (OERW250P) screen (**Materials » Sales Order Entry » Sales Order Shipping » Print WA250 Packing Slips**).

For this enhancement, new Costpoint screens include the corresponding functions:

Print WA250 Packing Slips (OERW250P)

Use this new screen (**Materials » Sales Order Entry » Sales Order Shipping » Print WA250 Packing Slips**) to print a packing slip for the WA250.

This new screen has the following subtasks:

- Catalog Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of catalogs that you want to print WA250 packing slips for.
- Customer Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of customers that you want to print WA250 packing slips from.

- Invoice Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of packing slips that you want to print.
- Project Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of projects that you want to print WA250 packing slips for.
- Sales Order Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of sales orders that you want to print packing slips for.

Print WA250 Invoices (OERW250)

Use this new screen (**Materials » Sales Order Entry » Sales Order Invoices » Print WA250 Invoices**) to print a report for the WA250.

This new screen has the following subtasks:

- Catalog Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of catalogs that you want to print WA250 invoices for.
- Customer Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of customers that you want to print WA250 invoices from.
- Invoice Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of invoices that you want to print.
- Project Non-Contiguous Ranges – Use this subtask to define on-contiguous ranges of projects that you want to print WA250 invoices for.
- Sales Order Non-Contiguous Ranges – Use this subtask to define non-contiguous ranges of sales orders that you want to print invoices for.

Configure Sales Order Entry Settings (OEMSET)

The following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Configure Sales Order Print Options (OEMPOPTS)

The following screen labels have been renamed:

- **Line No on DD250** to **Line No on DD250/WA250**
- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manages Sales Orders (OEMNTS01)

On the Order Details tab, the following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Invoices (OEMINVC1)

On the Print Info tab, the following screen labels have been renamed:

- **Print DD250 Invoice** to **Print DD250/WA250 Invoice**
- **DD250 Invoice Printed** to **DD250/WA250 Invoice Printed**

Manage Sales Order Catalog Defaults (OEMCATLG)

The following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Sales Order Project Defaults (OEMPROJ)

The following screen labels have been renamed:

- **DD250 Invoice** to **DD250/WA250 Invoice**
- **DD250 Packing Slip** to **DD250/WA250 Packing Slip**

Manage Shipping Transactions (OEMSHIP)

On the Shipping Information tab, the following screen labels have been renamed:

- **DD250 PS Printed** to **DD250/WA250 PS Printed**
- **DD250 PS** to **DD250/WA250 PS**

Print DD250 Invoices (OER250I)

On the Print Options, under Actions tab, the check box has been renamed from **Execute Update DD250 Invoice Printed flag after reports are printed** to **Execute Update DD250 Invoice Printed flag after reports are printed**.

In addition, application logic has been modified so that when you run the **Update DD250/WA250 Printed flag**, the application selects the DD250/WA250 Invoice Printed check box on the Manage Invoices (OEMINVC1)/Manage Invoices Supervisor Screen (OEMINVC2).

Standard Costing

This feature enables you to use standard costing methods for inventory valuation. Prior to this feature, only average actual costing method is available in Costpoint.

This enhancement has no impact on current functionality.

The functionalities of this updates/enhancements are not available until the full feature is released.

Standard costing enhancement features the following:

- New secure standard costing tables for item standard cost and project item standard cost
- New application to calculate future standard costs
- New application for purchase price variance (PPV)
- Ability to calculate and post variances for PPV and manufacturing costs (materials, labor, misc 1, misc 2, subcontractor) and corresponding overheads
- Ability to update item preprocessor for new cost tables
- Modified WIP variance process to include breakdowns for average actual and standard costing

Administration

Select a Default Application on the Manage Users (SYMUSR) Screen

The new **Default Application ID** and **Application Name** fields on the **User Interface** tab on the Manage Users (SYMUSR) screen enables the System Administrator to select an application that will automatically display when a user logs in to Costpoint.

Select a Default Application on the User Preferences (UPMUSRPR) Screen

The new **Default Application** and **Application Name** fields on the User Preferences (UPMUSRPR) screen enables you to select an application that will automatically display when you log in to Costpoint.

Reports & Analytics

There are no changes to this domain for this release.

Budgeting and Planning

There are no changes to Deltek Budgeting and Planning for this release.

Time & Expense

Time

Save Default Values for Timesheet Export

A **Save Defaults** button was added to the **Time » Interfaces » Export Timesheets** screen. Click this button to save the current field settings as default values for future use.

A **Reload Defaults** button was also added. Click this button if, having entered new values, you want to revert to the previously saved values.

When you click **Save Defaults**, values entered in the following fields are either saved or not saved as indicated in the following list:

- Basic fields:
- Saved values include: **Timesheets**, **Subcontractor Export**, and **Costpoint Company**.
- **Batch ID** and **ADP Filename** are *not* saved.
- **Export Options –** All values in this section are saved.
- **Print Options –** All values in this section are saved.
- **Export to Costpoint Options –** No values in this section are saved.
- **Auto Adjust Options for Regular Timesheets –** All values in this section are saved.
- **Timesheet Generation –** All values in this section are saved.
- **Default Information –** No values in this section are saved.

Manage Timesheets Application Toolbar Improvements

The directional arrows in the Manage Timesheets screen were modified to make them function in the same way they did in earlier versions of Time & Expense.

In Form view, the application opens to the current timesheet by default. Prior to this update, clicking the left arrow displayed the next (future) timesheet period, and clicking the right arrow displayed the previous (earlier) timesheet period. This was opposite of how the arrows functioned in version 9.x.

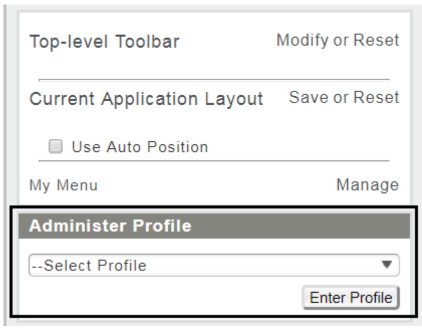
To simplify navigation between timesheet periods, the following updates were made:

Button	Module
	This button was removed from the application toolbar.
	Clicking this directional arrow displays the timesheet of the previous (earlier) pay period. Prior to this update, clicking this arrow displayed the next timesheet period.
	Click this directional arrow to display the timesheet for the next pay period. Prior to this update, clicking this arrow displayed the last timesheet period.
	This button was removed from the application toolbar.

To further simplify the Manage Timesheets toolbar for end users, a new **Toolbar Controls** option was added to **Options » Show/Hide Screen Controls.** This enables administrators (when logged on using an administrator profile) to remove (hide from view) the Table/Form and Query buttons.

If you have administrator privileges and want to hide application toolbar buttons, complete the following steps:

1. Log on using your administrator profile.
2. Open the Screen Configuration panel by either selecting **Screen Configuration** from the Options menu or by clicking on the top-right corner of your Costpoint screen.
3. From the Administrator Panel drop-down list, select the user profile that corresponds to the timesheet users for whom you want to hide application toolbar buttons.



4. Click **Enter Profile**.
5. Click **Time » Timesheets » Manage Timesheets**.
6. Click **Options » Show/Hide Screen Controls**.
7. In the Show/Hide Screen Controls screen, select **Toolbar Controls**.

   Note that this option only displays in User Profile mode.
8. In the table, click the **Always Hide** check box next to each toolbar option you want to hide and click **Apply**.

Manage Timesheets Header Interface Simplification

The header area of the **Time » Timesheets » Manage Timesheets** screen was updated to remove fields that display information that employees already know. These include the following fields:

- Revision
- Class
- UDT (01-15) or other configured value (an employee code, for example)

Additionally, the Notes tab was also removed, since it is not used by employees, and the **Sign** button was moved to the lower right-hand area to align with other screen buttons.

Image of screen before update:

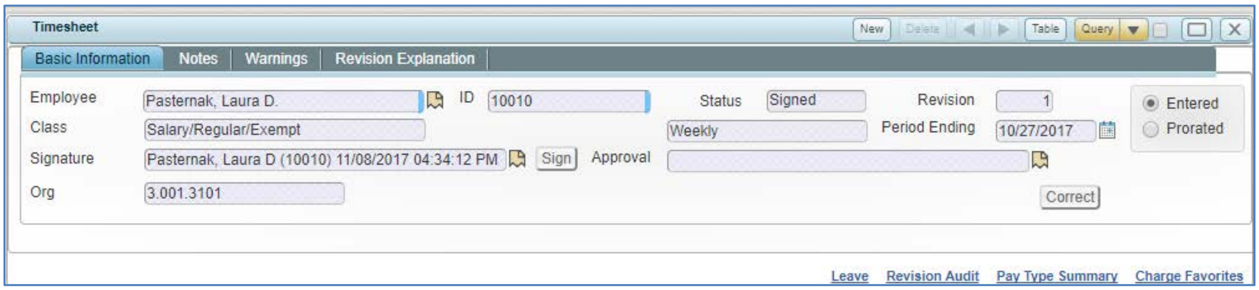
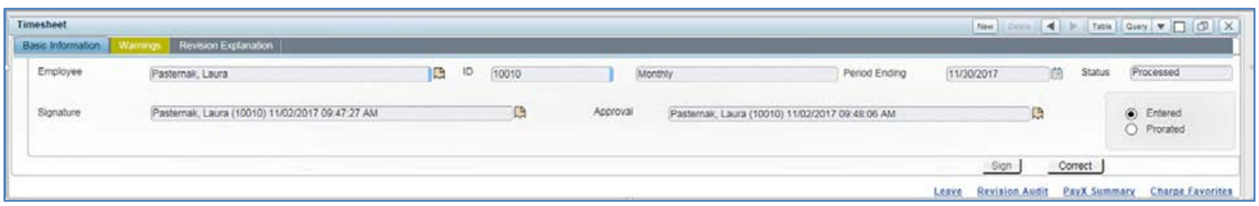


Image of screen after update:



These fields and the Notes tab were *not* removed from **Time » Timesheets » Manage/Approve Timesheets**.

Expense

Changes to Subtasks on New Expense Reports

The **Expense Reports » Manage Expense Reports** and the **Expense Reports » Manage/Approve Expense Reports** screens were updated so that the following subtasks no longer display on newly created expense reports, since they are not applicable:

- Advances
- Billable
- Charge Distribution
- Company Paid
- Non-Reimbursable
- Payment
- Revision History

- Workflow

Changes to Subtasks on New Expense Authorizations

The **Expense Authorizations » Manage Expense Authorization** and the **Expense Authorizations » Manage/Approve Expense Authorizations** screens were updated so that the following subtasks no longer display on newly created expense authorizations, since they are not applicable:

- Revision History
- Charge Distribution
- Workflow

Configuration

There were no changes to Configuration for this release.

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