Deltek

Deltek Costpoint® Enterprise GovCon Cloud

December 2022 Release Notes

(Costpoint MR Version 8.1.14)

December 2022

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Contents

Overview

This document is a compilation of Costpoint, Costpoint Planning, and Time & Expense enhancements and software defect resolutions from November 2022 (CP Maintenance Release 8.1.14) and also includes any regulatory enhancements.

These will be applied to the Cloud environment mid-December. See announcements on your portal page for details.

Note that the version numbers above (for example, 8.1.14) refer to the Costpoint Maintenance Release (MR) upon which this document is based are for reference only.

If you have feedback or questions, please send an email to DeltekDocumentationFeedback@deltek.com

Enhancements

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

Regulatory

Federal

2022 Federal ACA Electronic Filing Updates

Costpoint now provides the ability to generate manifest and data files that comply with the latest tax year 2022 schema for the UI transmission channel. This release applies the following updates for the Create 1094-C and 1095-C Electronic File screen to support the latest federal requirements:

- The software ID "22A0014924" for Calendar Year 2022 must be added.
- The tax year in all applicable namespaces must be updated to "ty22".

Attention: For more information, refer to:

- Release Memo for Tax Year 2022 Forms 1094-B, 1095-B, 1094-C, and 1095-C (irs.gov)
- Schema: https://www.irs.gov/pub/irs-schema/aca-schemas-ty2022-v1.zip

2022 Federal Poverty Level

The 2022 federal poverty guideline for the 48 contiguous states and the District of Columbia is **$13,590**. This Costpoint release updates the Federal Poverty Level for Payroll Year 2022 on the Manage Federal Taxes screen.

Attention: For more information, refer to: https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines.

2022 FUTA Credit Reductions

For 2022, employers in California, Connecticut, Illinois, and New York will be assessed a general FUTA credit reduction of 0.3% on wages paid to employees for work attributed to any of these states. The reduction will cause employers to pay an effective tax rate of 0.9% or up to $63 for each employee when applied to the federal unemployment-taxable wage base of $7,000.

Employers in the US Virgin Islands will be assessed a general FUTA credit reduction of 3.6% on wages paid to employees for work attributed to the territory. The reduction will cause employers in the US Virgin Islands to pay an effective federal unemployment tax rate of 4.2%, or up to $294 for each employee when applied to the federal unemployment-taxable wage base.

This Costpoint release adds records on the Manage Federal Taxes screen for the corresponding states:

State	Final 2022 FUTA Credit Reduction
California	0.3%
Connecticut	0.3%

State	Final 2022 FUTA Credit Reduction
Illinois	0.3%
New York	0.3%
US Virgin Islands	3.6%

2023 Social Security Wage Base

The maximum amount of earnings subject to the Social Security tax increases from $147,000 to $160,200. To support the new limit, Costpoint adds a 2023 payroll year with an updated Social Security Wage Limit on the Manage Federal Taxes screen.

> **Attention:** For more information, refer to: https://www.ssa.gov/news/press/factsheets/colafacts2023.pdf.

2023 401(k) Limits (1816418)

The IRS provided the following 401(k) updates for 2023:

- The salary deferral limit increased from $20,500 in 2022 to **$22,500** in 2023.
- The annual compensation limit increased from $305,000 in 2022 to **$330,000** in 2023.

To support the 2023 limits, Costpoint sets the 401(k) Deferral Limit to **$22,500** and 401(k) Wage Limit to **$330,000** for payroll year 2023 on the Manage Federal Taxes screen.

> **Attention:** For more information, refer to:
>
> - **IRS website**: https://www.irs.gov/retirement-plans/401k-plans-deferrals-and-matching-when-compensation-exceeds-the-annual-limit
> - **Notice 2022-55**: https://www.irs.gov/pub/irs-drop/n-22-55.pdf

2022 Form 1099-MISC Updates

The IRS released the 2022 updates to form 1099-MISC.

> **Note:** The 1099-MISC updates discussed in this section are retrieved from the IRS 2022 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 has the new Box 13, which is assigned to the Foreign Account Tax Compliance (FATCA) filing requirement checkbox. Furthermore, the previous box numbers 13 to 17 have been renumbered to box numbers 14 to 18, respectively.

Print/Create 1099s and Magnetic Media

The Print/Create 1099s and Magnetic Media screen has been updated to accommodate the IRS 2022 updates to forms 1099-MISC and 1099-NEC.

When you set the **Calendar Year** to 2022 and you print 1099s on this screen, the output displays using the 2022 format and layout for the 1099 forms.

The magnetic media format has also been updated according to the 2022 Specifications for Electronic Filing of Forms.

> **Note:** For details on the 2022 specifications for electronic filing, download the IRS Publication 1220 through this link: https://www.irs.gov/pub/irs-pdf/p1220.pdf.

State

2023 SUTA Wage Base Updates

This Costpoint release adds tax table records effective January 1, 2023, on the Manage State Taxes screen for states where the unemployment-taxable wage base has been updated for tax year 2023.

Arizona

The unemployment-taxable wage base increases from $7,000 to **$8,000**.

Colorado

The unemployment-taxable wage base increases from 17,000 to **$20,400**.

Iowa

The unemployment-taxable wage base increases from $34,800 to **$36,100**.

Missouri

The unemployment-taxable wage base decreases from $11,000 to **$10,500**.

Nevada

The unemployment-taxable wage base increases from $36,600 to **$40,100**.

New Jersey

The unemployment-taxable wage base increases from $39,800 to **$41,100**.

New York

The unemployment-taxable wage base increases from $12,000 to **$12,300**.

Vermont

The unemployment-taxable wage base decreases from $15,500 to **$13,500**.

Washington

The unemployment-taxable wage base increases from $62,500 to **$67,600**.

Wyoming

The unemployment-taxable wage base increases from $27,700 to **$29,100**.

Arizona 2023 Tax Table Updates

Tax rates used in Arizona’s withholding certificate decreases for 2023, and all taxpayers must complete a new form for 2023.

The rates used in the 2023 Form A-4, Employee's Arizona Withholding Election, range from **0.5%** to **3.5%**, down from 0.8% to 5.1%.

If an employee does not submit Form A-4, the tax rate to be used is **2%**, down from 2.7%, as the middle of the seven rates provided.

To support the state requirements, this release adds records on the following screens:

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

Attention: For more information, refer to: https://azdor.gov/forms/withholding-forms/arizona-withholding-percentage-election.

California 2023 Tax Table Updates

California's withholding methods were updated for 2023. The following are the details:

- The annual low income exemption threshold increases to **$17,252** or **$34,503**, up from $15,916 or $31,831. The amount depends on the employee's filing status and, for married employees, the number of allowances claimed.
- The annual standard deduction is to increases to **$5,202** or **$10,404**, up from $4,803 or $9,606. The amount depends on the employee's filing status and, for married employees, the number of allowances claimed.
- The value of a state allowance increases from $141.90 to **$154** annually.
- The tax rates used in Method B continue to range from 1.1% to 14.63%. The tax brackets used are to be adjusted compared to 2022.

To support the state requirements, this release adds records on the following screens:

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

Colorado FAMLI Program Deduction Type

Colorado voters approved Proposition 118 in November of 2020, paving the way for a state-run Paid Family and Medical Leave Insurance (FAMLI) program. The FAMLI program is a social insurance program with both employers and employees contributing to the fund that will eventually pay out benefits.

The premiums are set to 0.9% (through 2024) of the employee's wage, with 0.45% paid by the employer and 0.45% paid by the employee. Premiums are paid on wages up to the Federal Social Security Wage Cap. Employers are required to begin these premium deductions on January 1, 2023. Wages subject to FAMLI premiums will be the same wages subject to Unemployment Insurance (UI).

Costpoint adds a new **COPFML** (Colorado FAMLI) deduction type on the Manage Deductions screen. This will allow you to indicate which deduction codes will be used for employer and employee contributions in FAMLI program beginning January 1, 2023.

Attention: For more information, refer to: https://famli.colorado.gov/employers.

Manage Employee Information

The screen will display a warning message if the deduction or contribution has a deduction type of **COPFML**, but the employee's SUTA state is not **CO** (Colorado).

Manage Employer Contributions

The screen will display a warning message if the contribution has a deduction type of **COPFML**, but the employee's SUTA state is not **CO** (Colorado).

Manage Employee Deductions

The screen will display a warning message if the deduction has a deduction type of **COPFML**, but the employee's SUTA state is not **OR** (Colorado).

District of Columbia 2022 Tax Table Updates

The District of Columbia announced that new personal income tax rates effective January 1, 2022, should be used for withholding despite no formal update to the district's withholding methods.

The personal income tax rate table was amended in the Income Tax Fairness Amendment Act of 2021, which was part of the city's fiscal 2022 budget. The amendment increased tax rates for those earning more than $250,000 per year, up to a highest rate of 10.75%, instead of 8.95%.

To support the state requirements, this Costpoint release adds tax table records effective January 1, 2022, on the following screens:

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

Attention: For more information, refer to:

- D.C. Law 24-45. Fiscal Year 2022 Budget Support Act of 2021: https://code.dccouncil.gov/us/dc/council/laws/24-45
- https://otr.cfo.dc.gov/release/district-columbia-tax-changes-take-effect-october-1-real-property-individual-income-and

Indiana Withholding Tax Updates (Phase 1): Track the Number of Adopted Children

Effective October 1, 2022, the state's Departmental Notice No. 1 was updated to add a third deduction constant table for a new exemption for adopted children. The $3,000 annual exemption for adopted children was added in the legislation. Form WH-4, Employee's Withholding Exemption and County Status Certificate, was also updated to include the adopted child exemption.

Currently, there is no field in Costpoint that can store and track the adopted child exemptions throughout Costpoint payroll. To be able to deduct this exemption when Costpoint calculates the state and local withholding amount, you must:

- Take note of the number of adopted child dependent exemptions claimed on line 7 of Form WH-4 and multiply the number by 2.

- Add the result to the value in the **Dependents** field on the Manage Employee Taxes screen.

The actual number of adopted child dependent exemptions claimed on line 7 of Form WH-4 will be tracked in a new information-only field, **Actual number of adopted children**. This field was added to the following screens in Costpoint:

- Manage Employee Taxes
- Manage Employee Information
- View Employee Taxes
- State Withholding
- Life Events/New Hires

Costpoint will be able to use the **Actual number of adopted children** field information during database conversion of the new fields for adopted child dependent exemptions that will be added later throughout payroll processing.

The **Actual number of adopted children** field will be enabled for State of Indiana only.

Manage Employee Taxes Data Setup for Indiana

To comply with the state requirements, you must use the following data setup on the Manage Employee Taxes screen for Indiana employees:

Field	Instructions
Withholding State Filing Status	**All Filers (All Filers, Married and Single)**: Select as the filing status for all employees.
State Withholding Exemptions	Enter the number of personal exemptions the employee is claiming on line 5 of the employee's Form WH-4.
State Withholding Dependents	Enter the number of additional dependent exemptions the employee is claiming on line 6 of the employee's Form WH-4. If the employee is claiming adopted child dependent exemptions on line 7 of the employee's Form WH-4, multiply it by two and add the number to this field. For example, if employee has 3 additional dependent exemptions (Form WH-4 line 6) and 2 adopted child dependent exemptions (Form WH-4 line 7), enter 7 as the total number of exemptions for State Withholding Dependents. **Note:** The number of dependent exemptions for Indiana county tax (local) withholding must be the same as the number of dependent exemptions for Indiana state withholding.
Local Taxes Dependents	Enter the number of additional dependent exemptions the employee is claiming on line 6 of the employee's Form WH-4.

Field	Instructions
	If the employee is claiming adopted child dependent exemptions on line 7 of the employee's Form WH-4, multiply it by two and add the number to this field. For example, if employee has 3 additional dependent exemptions (Form WH-4 line 6) and 2 adopted child dependent exemptions (Form WH-4 line 7), enter 7 as the total number of exemptions for Local Taxes Dependents. **Note:** The number of dependent exemptions for Indiana county tax (local) withholding must be the same as the number of dependent exemptions for Indiana state withholding.
Actual number of adopted children	Use this field to specify the number of adopted children claimed by the employee on the Form WH-4. This value will not be used with the first phase of the Indiana 2022 tax withholding updates but should still be entered as it will be used in the second phase. It's important that you provide this information if the State Withholding Number of Dependents and Local Withholding Number of Dependents include exemptions for an adopted child or children.

Attention: For more information, refer to:

- Departmental Notice #1: https://www.in.gov/dor/files/reference/dn01.pdf
- WH-4: https://www.in.gov/dor/tax-forms/withholding-tax-forms/

Kentucky 2023 Tax Table Updates

Kentucky provided the following tax updates for 2023:

- The 2023 state standard deduction is **$2,980**.
- The 2023 state tax rate is **4.5%** of taxable income.

To support the state requirements, this release adds records on the following screens:

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

Attention: For more information, refer to the 2023 Kentucky Withholding Tax Formula: https://revenue.ky.gov/Software-Developer/PublishingImages/Pages/default/2023_42A003(T)(12-22)(2023).pdf.pdf.

Montana 2023 Tax Table Updates

Montana's withholding methods were adjusted for inflation effective January 1, 2023. The following are the updates:

- The value of a state allowance in the withholding methods increased from $1,900 to **$2,070** annually.
- The tax brackets used in the withholding formula were also adjusted.

To support the state requirements, this release adds records on the following screens:

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

Attention: For more information, refer to: https://mtrevenue.gov/publications/withholding-tax-guide-with-montana-withholding-tax-tables/.

Nebraska 2023 Tax Table Updates

The following are the tax updates for Nebraska effective January 1, 2023:

- The annual withholding allowance increases from $2,080 to **$2,140**.
- The annual withholding tables for Single and Married have been updated.

To support the state updates, this release adds records on the following screens:

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

Attention: For more information, refer to: https://revenue.nebraska.gov/sites/revenue.nebraska.gov/files/doc/2023_Circular_EN_8-429r2023_Whole_Book_4.pdf.

Oregon SUTA Electronic Filing

Costpoint adds a new **ORPFML** (Paid Leave Oregon) deduction type on the Manage Deductions screen. This will allow you to indicate which deduction codes will be used for employer and employee contributions in the Paid Leave Oregon program beginning January 1, 2023.

Beginning in the first quarter of 2023, the appropriate value for the Statewide Transit Tax (STT) and Paid Leave Oregon contributions shall be reported in the RS (State Record Layout) in the quarterly unemployment electronic file. Currently, both STT and Paid Leave are blank if the reporting quarter is earlier than Q1 2023.

Attention: For more information, refer to:

- **FAQs**: https://www.oregon.gov/employ/modernization/Pages/Frances-Online-FAQs.aspx
- **File Layout**: https://www.oregon.gov/employ/modernization/Documents/Single%20BIN%20EFW2%20Form132%202022.xlsx

Manage Employee Information

The screen will display a warning message if the deduction or contribution has a deduction type of **ORPFML**, but the employee's SUTA state is not **OR** (Oregon).

Manage Employer Contributions

The screen will display a warning message if the contribution has a deduction type of **ORPFML**, but the employee's SUTA state is not **OR** (Oregon).

Manage Employee Deductions

The screen will display a warning message if the deduction has a deduction type of **ORPFML**, but the employee's SUTA state is not **OR** (Oregon).

Create Quarterly SUTA Tax File

When you create a quarterly SUTA tax file for Oregon, the following will be applied:

- Populate the following with appropriate values beginning Q1 2023:
  - State Quarterly PFMLI Total Wages (RS 341-351)
  - State Wide Transit Tax Subject Wages (RS 352-362)
  - State Wide Transit Tax (STT) (RS 363-373)
- An error will display if the amounts are negative for the following:
  - State Quarterly Unemployment Insurance Total Wages (RS 203-213)
  - State Quarterly PFMLI Total Wages (RS 341-351)
  - State Wide Transit Tax Subject Wages (RS 352-362)
  - State Wide Transit Tax (STT) (RS 363-373)

South Carolina Tax Table Update

The following are the tax updates for South Carolina effective January 1, 2023:

- The number of tax brackets used in the formula decreased to three, with rates of **zero**, **3%**, and **6.5%**, instead of the previous six, with rates ranging from 0.2% to 7%.
- The value of a state allowance increased from $2,750 to **$4,310**, and the maximum standard deduction increased from $4,580 to **$6,475**.
- The state also released the 2023 Form SC W-4, South Carolina Employee's Withholding Allowance Certificate.

To support the state requirements, this release adds records on the following screens:

- Manage State Standard Deductions
- Manage State Taxes

- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

Attention: For more information, refer to:

- **Formula**: https://dor.sc.gov/forms-site/Forms/WH1603F_2023.pdf
- **SC W-4**: https://dor.sc.gov/forms-site/Forms/SCW4_2023.pdf

Accounting

AP Unique Entity Identifier (UEI) in Vendor Addresses

The System for Award Management (SAM.gov) provides the option for a single taxable entity to have multiple Unique Entity Identification (UEI) numbers for its units in different locations. To allow this functionality in Costpoint, various screens are updated in the Accounting, Contracts, and Materials domain.

Accounting

Manage Vendors

The **UEI Number** and **CAGE Code** fields are added to the Addresses subtask of the Manage Vendors screen.

When you add a new vendor address, the **UEI Number** and **CAGE Code** for that record default to the values of the same fields on the Header tab. However, if you modify the **UEI Number** and **CAGE Code** fields on the Header tab, their corresponding fields in the Addresses subtasks will not be affected. Likewise, if you modify the **UEI Number** and **CAGE Code** fields at the address level, their corresponding fields on the Header tab will not be affected.

Import Vendors

The UEI Number column is added to the Vendor Address Input File that is used when importing vendors using the Import Vendors screen.

Contracts

Manage Contract Management Vendor Info

The **UEI Number** field is added to the Address/Contact Info subtask of the Manage Contract Management Vendor Info screen.

When you add a new prospective vendor address, the **UEI Number** for that record defaults to the value of the same field on the General tab. However, if you modify the **UEI Number** on the General tab, its corresponding field in the Address/Contact Info subtask will not be affected. Likewise, if you modify the **UEI Number** field at the address level, its corresponding field on the General tab will not be affected.

Approve Prospective Vendors

When you approve a prospective vendor, the **UEI Number** of each Address/Contact line for that vendor will be entered in the Addresses subtask of the Manage Vendors screen.

Materials

Manage Purchase Orders

When you select a **Vendor Address**, the UEI number for that address entered in the Addresses subtask of the Manage Vendors screen will display in the **UEI Number** field.

Print Purchase Orders

If the **Print UEI Number** checkbox is selected for the purchase order (PO) being printed, the **UEI Number** of the Vendor Address selected on the Manage Purchase Orders screen displays on the printed PO.

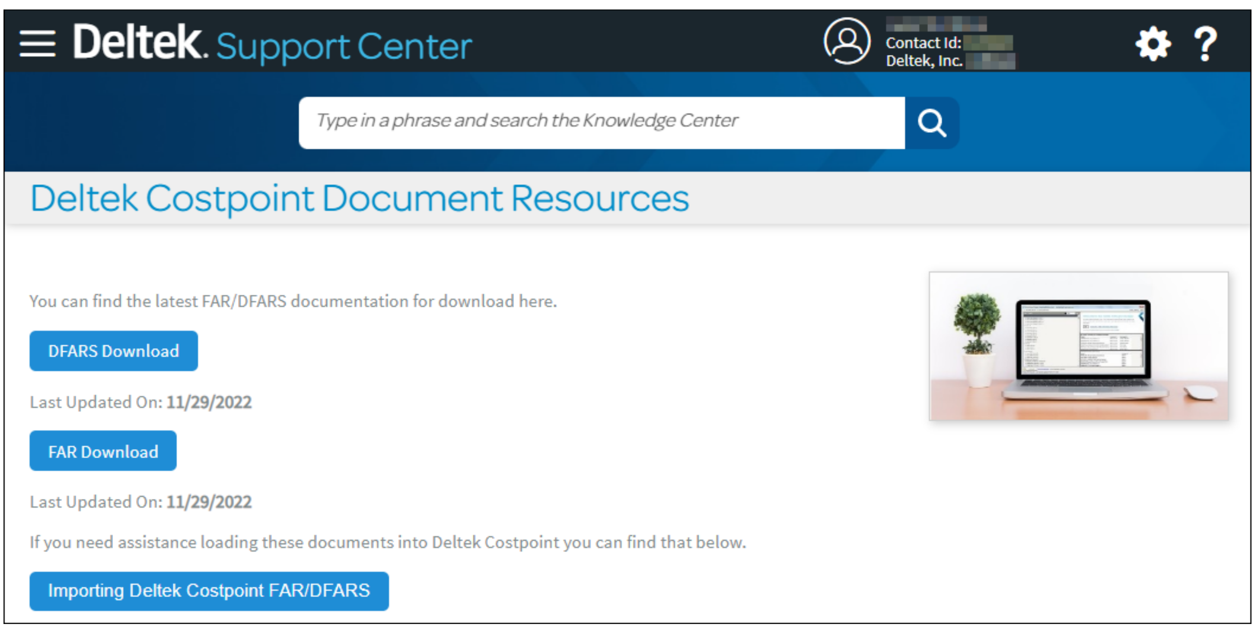
Print Purchase Order Change Orders

If the **Print UEI Number** checkbox is selected for the purchase order (PO) change order being printed, the **UEI Number** of the **Vendor Address** selected on the Manage Purchase Orders screen displays on the printed PO change order.

CRM & Contracts

Updated FAR/DFARS Clauses and Provisions (November 2022)

The Deltek Costpoint Document Resources page (https://deltek.custhelp.com/app/CPDocRes) in Deltek Support Center has been updated to provide you the latest lists of Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) clauses and provisions from Acquisition.gov. This enables you to import into Costpoint up-to-date regulation clauses and provisions and apply them to your contracts and subcontracts.



As in existing functionality, on this page, you can click the **DFARS Download** or **FAR Download** button to download a comma-separated values (CSV) file containing the most recent list of FAR/DFARS clauses and provisions. The downloaded .csv file is already formatted as an input file that you can import into Costpoint using the Manage FAR Library and Manage Supplemental Regulations Library applications.

> **Note:** The input files are designed so that you can readily import them into Costpoint. You can, however, still rename the files or change the content if necessary.

If you need assistance in uploading the documents, click the **Importing Deltek Costpoint FAR/DFARS** button. This brings up a page with information on importing FAR/DFARS clauses and provisions into Costpoint.

People

Labor Settings

Transfer of Deltek Time and Expense Export Settings to the Corporate Labor Settings

Prior to this release, you can set up the following Time and Expense export settings on only the Export Data to Deltek Time and Expense (LDPDTC) screen:

- Project mapping
- Account mapping
- Project name option
- Manufacturing Order (MO) name options

However, the Export Data to Deltek Time and Expense screen allowed you to save different options in different parameters. This means that the exported data may not be consistent each time, which may cause inconsistencies in the user data.

To address this issue, Costpoint now allows you to only control these specific settings on the Corporate Labor Settings subtask on the Configure Labor Settings screen. Display-only versions of the same fields will be available on the Corporate Settings tab on the Export Data to Deltek Time and Expense screen.

The fields on the Corporate Settings tab of the Export Data to Deltek Time and Expense screen will display the values from fields on the Corporate Labor Settings subtask of the Configure Labor Settings screen.

Warning: Before you install 8.1.14, Deltek recommends that you take a screen capture of the Integration Setting tab (**Time & Expense » Configuration » General Controls » General Settings**) for later reference when you follow the post-installation instructions.

After you apply MR 8.1.14, you must complete a one-time setup of your export settings to ensure that the Project/MO names and mappings in Time and Expense are still correct. It is not possible for Deltek to configure these export settings for your company automatically.

To set up your Deltek Time and Expense export settings:

1. In Costpoint, click **People » Labor » Labor Controls » Configure Labor Settings**.
2. Click the Corporate Labor Settings subtask and enter the following Deltek Time and Expense export settings being used by your company before the update:
   - Project Name
   - MO Build Description
   - Project Mappings
   - Account Mappings

   Please note that for co-deployed systems, the export is not required for the Project Name, MO Build Description, and Mappings to update Time and Expense.
3. Save your changes.

Configure Labor Settings (LDMLABOR)

The Configure Labor Settings screen provides the following updates in the Corporate Labor Settings subtask:

- A new **Deltek Time and Expense Export Settings** group box contains the following fields from the Export Data to Deltek Time and Expense screen:
  - Project Name
  - Export Project Roles (UDT02_SPVSR)
  - MO Build Description options
  - Project Mapping fields
  - Account Mapping fields
- The options in the **Version** field were updated:
  - The **Time & Expense 10.x** option is now **Time & Expense in Costpoint 8.x**.
  - The **Time & Expense 9.x** option is now **Time & Expense (standalone) 9.x**.
- The option in the **Subcontractor Version** field was updated. The **Time & Expense 10.x** option is now **Time & Expense in Costpoint 8.x**.

Export Data to Deltek Time and Expense (LDPDTC)

The Export Data to Deltek Time and Expense screen provides a new Corporate Settings tab, which contains display-only fields of the following settings:

- Project Name
- Export Project Roles (UDT02_SPVSR)

- MO Build Description options
- Project Mapping fields
- Account Mapping fields

The default values of these fields are from the Corporate Labor Settings subtask of the Configure Labor Settings screen.

Ability to Print W-2s and W-3s on Blank Stock Using PDF Template

Prior to this release, you were able to print Form W-2 on only pre-printed forms from recommended vendors. In this release, Costpoint adds the ability to save Form W-2s as PDF files, which you can use to print on plain paper or blank stock. This feature will prevent alignment problems that occur when you use pre-printed forms.

This Costpoint release adds multiple W-2 options, including an option to create a Substitute Copy A on the Print W-2s screen, which automatically creates a corresponding Form W-3. The W-3 includes additional employer information that you can now set up on the existing Manage Tax Report Data screen.

Print W-2 or W-3 Forms with Data on Blank Stock or Plain Paper

Use the Print W-2s screen to print W-2 or W-3 Forms on blank stock or plain paper instead of on pre-printed forms.

To print W-2 or W-3 forms on blank stock/plain paper:

1. On the Print W-2s screen, enter the selection ranges for employees, taxable entity, and payroll year for the W-2 or W-3 Form.

   Note: To print on blank stock or plain paper, you must enter a **Payroll Year** of **2022** or later.

2. In the **Report Type** group box, select the **W-2** option.

   Note: To print on blank stock or plain paper, you must select **W-2** as the **Report Type**.

3. In the **Paper** group box, select the **Blank Stock/Plain Paper (Saved as PDF Files)** option and enter the location for saving the PDF files in the **File Location** field.

   Attention: Please see *IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3* for the requirements of the Internal Revenue Service (IRS) and the Social Security Administration (SSA) regarding the preparation and use of substitute forms for Form W-2 (Wage and Tax Statement) and Form W-3 (Transmittal of Wage and Tax Statements) for wages paid during the 2022 calendar year.

4. In the **W-2 (Form with Data)** group box, select the options for printing employee W-2 forms with data to a PDF.

Option	Description
One Copy per Page	Select this option if you want to print only one W-2 form per page. You can use this option to print employee copies on 8.5 x 11-inch plain paper.

Option	Description
	Note: Deltek's partner forms providers do not have blank stock forms for one W-2 per page. This option allows you to do either one of the following: ▪ Print per copy (for example, print Copy B first, then Copy C, then Copy 2, and then Employee Filing Instructions last), and then collate the printed copies per employee. ▪ Print a set of employee copies, which will include the filing instructions. The One Copy per Page options are: ▪ **Copy B**: Select this option to generate one W-2 Form Copy B per page, per employee. **Note:** According to IRS regulations, instructions similar to those contained on the back of Copies B, C, and 2 of the official IRS Form W-2 must be provided to each employee. Because the filing instructions will not print on the back of the W-2 Form (Copy B), you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the W-2 Form Copies B, C, and 2 that will be mailed to the employee. ▪ **Copy C**: Select this option to generate one W-2 Form Copy C per page, per employee. ▪ **Copy 2**: Select this option to generate one W-2 Form Copy 2 per page, per employee. ▪ **Employee's W-2 Set (B, C, 2, Instructions)**: Select this option if you want to print a set of W-2s per employee with only one W-2 form per page. This set includes Copy B, Copy C, Copy 2, and a copy of filing instructions per employee. Four separate pages will print for each employee. The generated PDF file will have the following file name format: <Taxable Entity>_< Payroll Year>W2_Set_<Timestamp>.pdf. **Note:** If you want a separate PDF file for each set of W-2s per employee, then you must also select the **One PDF File per Employee** checkbox in the **Print Options** group box. The generated PDF files will have the following file name format: <Last name of employee>_<Employee ID>_<Payroll Year>W2_<Timestamp>.pdf.

Option	Description
2-Up	Select this option if you want to print two W-2 forms per page. This is used for government reporting or employer copies where two employee records are printed per page. You can print this either on 2-Up blank stock from Deltek partner forms providers or on 8.5 x 11-inch plain paper. ▪ **Substitute Copy A (SSA-Approved)**: Select this option if you want to print a black and white Copy A of Form W-2. A PDF will be generated, and you can use that file to print the W-2 Forms (Copy A). Two W-2 Forms (Copy A) will print per page. A separate PDF file for the W-3 will be automatically created and saved in the same location as the Form W-2 Copy A. **Note:** According to *IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3*, W-2 Forms (Copy A) must be printed on 8.5 x 11-inch single-sheet paper only. There must be two W-2 Forms (Copy A) printed on a page. There must be no horizontal perforations between the two W-2 Forms (Copy A) on each page. All forms and data must be printed in nonreflective black ink only. ▪ **Copy 1**: Select this option if you want to print two W-2 Forms (Copy 1) per page. ▪ **Copy D**: Select this option if you want to print two W-2 Forms (Copy D) per page.
4-Up (B, C, 2, 2)	Select this option to generate a PDF file for employee W-2 Forms Copy B, Copy C, and two copies of Copy 2. The employee's Copy B, Copy C, and two copies of Copy 2 will be printed on one sheet per employee. The paper for all copies must be white and printed in black ink.

Option	Description
	Note: It is highly recommended to print this on 4-Up perforated blank stock from Deltek partner form providers. According to IRS regulations, "Employee copies of Form W-2 (Copies B, C, and 2), including those that are printed on a single sheet of paper, must be easily separated. The best method of separation is to provide perforations between the individual copies. Whatever method of separation is used, each copy should be easily distinguished." The IRS and SSA guidelines also state that the employee filing instructions must be provided to each employee. Because the filing instructions will not print on the back of the 4-Up if you print to plain paper, you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the 4-Up W-2 Form that will be mailed to the employee.
Employee Filing Instructions	Select this option to generate a PDF file of the employee filing instructions found at the back of Copies B, C, and 2 of the official IRS Form W-2. After you generate the PDF file, you can print the instructions on 8.5 x 11-inch plain paper and include it with the W-2 Forms Copy B, C, and 2 that will be mailed to the employee.

5. Select the **Print W-2 Forms with Data** option from the Action Menu to generate W-2 or W-3 forms with data.

   The application saves the forms as PDF files in the specified file location. PDF files will have an appropriate file name depending on the selected W-2 copies. For example, if you select Substitute Copy A (SSA-Approved), the generated PDF files will have the following file name format:

   - W-2 Copy A: < Taxable Entity>_< Payroll Year>W2_CopyA_< Timestamp>.pdf
   - W-3: < Taxable Entity >__< Year>W3_< Timestamp>.pdf

   Note: If you select **Substitute Copy A (SSA-Approved)**, the application will automatically create a separate Form W-3 PDF file.

6. In a PDF reader, open the generated PDF files and review the data on the W-2s or W-3 forms.
7. Load your printer with the appropriate plain paper or blank stock and print the forms using black ink. You must configure your printer settings to print the forms in actual size.

Manage Tax Report Data (PRMMAG)

The Manage Tax Report Data adds the following new fields that are included on Form W-3:

Field	Description
Kind of Payer	From the drop-down list, select the option that best describes the kind of payer that will be reported in the W-3 PDF file when the Substitute Copy A (SSA-Approved) option is selected on the Print W-2s screen. Options are: ▪ **Regular (Form 941)**: This is the **941** box in Form W-3. ▪ **Agriculture (Form 943)**: This is the **943** box in Form W-3. ▪ **Household (Schedule H)**: This is the **Hshld. Emp.** box in Form W-3. ▪ **Military (Form 941)**: This is the **Military** box in Form W-3. ▪ **Medicare Qualified Government Employment (Form 941)**: This is the **Medicare gov't. emp.** box in Form W-3. ▪ **Railroad (CT-1)**: This is the **CT-1** box in Form W-3. ▪ **Regular (Form 944)**: This is the **944** box in Form W-3.
Establishment Number	Enter a value to identify separate establishments in your business in W-3.

The Manage Tax Report Data screen was previously named the Manage Tax File Data screen.

Print W-2s (PRRW2)

The Print W-2s screen provides the ability to print W-2s on blank stock or plain paper through the new **Print W-2 Forms with Data** option on the Action Menu. When you run this process, the application will save Form W-2s as PDF files in the specified location.

To support this new functionality, the application adds the following group boxes/fields:

Group Box/Field	Description
Paper	Use this group box to select if the W-2 will be printed on a pre-printed form or on plain paper or blank stock. **Note:** This group box will be enabled only if the **Report Type** is **W-2** and the **Payroll Year** is **2022** or later. ▪ **Pre-Printed**: Select this option if you are printing W-2 or W-2c user data only on pre-printed forms. Use the Print Menu for this option. ▪ **Blank Stock / Plain Paper (Saved as PDF Files)**: Select this option if you are printing W-2 form with data on blank stock or plain paper. With this option, the W-2 will be printed to a PDF, rather than a printer. The W-2s will be saved as PDF files in the specified location. You must use the Action Menu for this option. After generating the PDFs, you can open the forms in a PDF reader and print them using blank stock from a forms provider or plain paper. You must configure your printer settings to print the

Group Box/Field	Description
	forms in actual size. If you opt to print the form on plain paper, you must use 8.5 x 11-inch plain paper. **Note:** This option is not available yet for the printing W-2c forms. If you select the **Blank Stock / Plain Paper (Saved as PDF Files)** option, you must specify the **File Location** where the PDF files will be saved, and then select the type of **W-2 copy from the W-2 (Form with Data)** group box. **Attention:** For more information, please refer to *Print W-2 or W-3 Forms with Data on Blank Stock or Plain Paper* procedure. Please see *IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3* for the requirements of the Internal Revenue Service (IRS) and the Social Security Administration (SSA) regarding the preparation and use of substitute forms for Form W-2 (Wage and Tax Statement) and Form W-3 (Transmittal of Wage and Tax Statements) for wages paid during the 2022 calendar year. ▪ **File Location**: Enter the location where W-2s will be saved. If you run the **Print W-2 Forms with Data** process, the application will save the Form W-2s as PDF files in the specified file location.
W-2 (Form with Data)	Use this group box to select the type of report you are printing on blank stock or plain paper. **Note:** This group box will be enabled only if **Blank Stock / Plain Paper (Saved as PDF Files)** is selected for Payroll Year **2022** or later. **One Copy per Page** Select this option if you want to print only one W-2 form per page. You can use this option to print employee copies on 8.5 x 11-inch plain paper. **Note:** Deltek's partner forms providers do not have blank stock forms for one W-2 per page. This option allows you to do either of the following: ▪ Print per copy (for example, print Copy B first, then Copy C, then Copy 2, and then Employee Filing Instructions last), and then collate the printed copies per employee. ▪ Print a set of employee copies, which will include the filing instructions.

Group Box/Field	Description
	The One Copy per Page options are: ▪ **Copy B**: Select this option to generate one W-2 Form Copy B per page, per employee. **Note:** According to IRS regulations, instructions similar to those contained on the back of Copies B, C, and 2 of the official IRS Form W-2 must be provided to each employee. Because the filing instructions will not print on the back of the W-2 Form (Copy B), you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the W-2 Form Copies B, C, and 2 that will be mailed to the employee. ▪ **Copy C**: Select this option to generate one W-2 Form Copy C per page, per employee. ▪ **Copy 2**: Select this option to generate one W-2 Form Copy 2 per page, per employee. ▪ **Employee's W-2 Set (B, C, 2, Instructions)**: Select this option if you want to print a set of W-2s per employee with only one W-2 form per page. This set includes Copy B, Copy C, Copy 2, and a copy of filing instructions per employee. Four separate pages will print for each employee. The generated PDF file will have the following file name format: <Taxable Entity>_< Payroll Year>W2_Set_<Timestamp>.pdf. **Note:** If you want a separate PDF file for each set of W-2s per employee, then you must also select the **One PDF File per Employee** checkbox in the **Print Options** group box. The generated PDF files will have the following file name format: <Last name of employee>_<Employee ID>_<Payroll Year>W2_<Timestamp>. **2-Up** Select this option if you want to print two W-2 forms per page. This is used for government reporting or employer copies where two employee records are printed per page. You can print this either on 2-Up blank stock from Deltek partner forms providers or on 8.5 x 11-inch plain paper. ▪ **Substitute Copy A (SSA-Approved)**: Select this option if you want to print a black and white Copy A of Forms W-2. A PDF will be generated, and you can use that file to print the W-2 Forms (Copy A). Two W-2 Forms (Copy A) will print per page. A separate PDF file for the W-3 will be automatically created and saved in the same location as the Form W-2 Copy A.

Group Box/Field	Description
	Note: According to *IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3*, W-2 Forms (Copy A) must be printed on 8.5 x 11-inch single-sheet paper only. There must be two Forms W-2 (Copy A) printed on a page. There must be no horizontal perforations between the two Forms W-2 (Copy A) on each page. All forms and data must be printed in nonreflective black ink only. ▪ **Copy 1**: Select this option if you want to print two W-2 Forms (Copy 1) per page. ▪ **Copy D**: Select this option if you want to print two W-2 Forms (Copy D) per page. **4-Up (B, C, 2, 2)** Select this option to generate a PDF file for employee W-2 Forms Copy B, Copy C, and two copies of Copy 2. The employee's Copy B, Copy C, and two copies of Copy 2 will be printed on one sheet per employee. The paper for all copies must be white and printed in black ink. **Note:** It is highly recommended to print this on 4-Up perforated blank stock from Deltek partner form providers. According to IRS regulations, "Employee copies of Form W-2 (Copies B, C, and 2), including those that are printed on a single sheet of paper, must be easily separated. The best method of separation is to provide perforations between the individual copies. Whatever method of separation is used, each copy should be easily distinguished." The IRS and SSA guidelines also state that the employee filing instructions must be provided to each employee. Because the filing instructions will not print on the back of the 4-Up if you print to plain paper, you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the 4-Up W-2 Form that will be mailed to the employee. **Employee Filing Instructions** Select this option to generate a PDF file of the employee filing instructions found at the back of Copies B, C, and 2 of the official IRS Form W-2. After you generate the PDF file, you can print the instructions on 8.5 x 11-inch plain paper and include it with the W-2 Forms Copy B, C, and 2 that will be mailed to the employee.
One PDF File per Employee	Select this checkbox to create a separate PDF file for each set of W-2s per employee. The file names will have a format of <Last name of employee>_<Employee ID>_< Payroll Year>W2_< Timestamp>.pdf.

Group Box/Field	Description
	Note: This checkbox is applicable only for **Employee's W-2 Set (B, C, 2, Instructions).**

The screen layout was updated to accommodate the new fields. The following are the details of the changes:

- The screen now lists the pre-printed paper options in new **W-2 (Data Only)** and **W-2c (Data Only)** group boxes. These options were formerly available in the **W-2 Form Type** and **W-2c Form Type** drop-down lists. These options are enabled only if you select the **Pre-printed** option in the **Paper** group box.
- The following fields are now in a **Print Options** group box:
  - Starting Control Number
  - Print only the last 4 numbers of SSN
  - One PDF File per Employee

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report reflects the field updates in this enhancement. The following are the details of the changes in the report:

- The report now provides information for the new PAYER_KIND and ESTABLISHMENT_NO columns in the MAG_MEDIA_RPT table.
- The description of the MAG_MEDIA_RPT table is now "Tax Report Data."
- The definition of the MAG_MEDIA_RPT table was updated to “Stores employer information used in the W-2 or W-3 report."

Reports & Analytics

Accounts Payable Package in Costpoint BI Supports Nvoicepay

You can now create the new Nvoicepay Payment Report in Costpoint Business Intelligence through the Accounts Payable package. The prompt selections for this report include bank accounts, check numbers, due dates, and posted dates, which help in filtering the records in the report.

Unique Entity Identifier (UEI) in the Accounts Payable Package in Costpoint BI

The System for Award Management (SAM.gov) provides the option for a single taxable entity to have multiple Unique Entity Identification (UEI) numbers for its units in different locations. In support of this, new fields are now available in the Accounts Payable package in Costpoint BI, such as the **UEI Number** and **CAGE Code**.

Time & Expense

Highlight of Single Error Messages

When a single error occurs, the related field requiring attention is now highlighted for easy identification.

This enhancement is related to a Timesheet improvement initiative described in KB Article 109655.

Reduced Size of Timesheet Header

The header area of the Timesheet application was reduced in size to provide more space for the timesheet lines.

This enhancement is related to a Timesheet improvement initiative described in KB Article 109655.

Update to General Settings

In co-deployed systems, values on the Integration Setting tab of the General Settings application (**Time & Expense » Configuration » General Controls**) are now disabled and automatically display the related Project Mapping and Account Mapping values from the Configure Labor Settings screen (**People » Labor » Labor Controls**). See “Transfer of Deltek Time and Expense Export Settings to the Corporate Labor Settings” in this document for related information and for important post-installation instructions.

Warning: Before you install 8.1.14, Deltek recommends that you take a screen capture of the Integration Setting tab for later reference when you follow the post-installation instructions.

Update to User Defined Fields

In co-deployed systems, the UDT02 application (**Time & Expense » Configuration » Master Data**) was updated so that the User Defined fields display the values designated on the Manage Project User Flow screen (**Projects » Project Setup » Project Master**).

In co-deployed systems, the UDT01 application (**Time & Expense » Configuration » Master Data**) was updated so that the User Defined fields display the values designated on the Manage Accounts screen (**Accounting » General Ledger » Accounts**).

Software Issues Resolved

Accounting

Accounts Payable » Import Accounts Payable Multicurrency Vouchers

Defect 1726539: When you entered non-USD currencies in the Exchange Rates subtask and imported accounts payable multicurrency vouchers, Costpoint disregarded the **Transaction** and **Pay** currencies you entered, and assigned the **Default Transaction** currency on the Configure Multicurrency Settings screen to the imported voucher. As a workaround, manually edit the **Trans** and **Pay** currencies of the imported voucher on the Manage Accounts Payable Vouchers screen.

General Ledger » Manage Accounts

Defect 1816096: This screen has been updated to set the default value of the **Date Edit** field on the UDT01S screen to the value of the **Date Edit** field on the General Settings screen when you create new accounts.

Framework

Framework

Defect 1766725: Costpoint needed more defensive code to minimize or eliminate the chances of SQL being blocked, which resulted in the system becoming unresponsive with the following error: "RequestBroker us busy. GET_PROD_HELP_DATA failed."

Defect 1813139: The Material module disappeared after switching companies.

Defect 1814249: The Conditions subtask for a workflow activity did not validate against updated values.

Defect 1821112: You might have encountered a critical system error when you tried to use the Manage Purchase Requisitions application in Offline mode with new and cloned purchase requests with extensibility on and off.

Defect 1821298: Costpoint updated metadata in SharePoint when it should not have.

Defect 1821537: Table columns were randomly highlighted in blue when you selected rows after columns were rearranged. Each time you selected a different row, the previously selected row's columns were highlighted.

This issue occurred in various applications, including Manage Employee Information, Manage Payroll Records, Manage Project User Flow, Manage Accounts, Manage Manufacturing Orders, View Inventory Transaction History, View Part Inventory, and View Timesheet History Inquiry.

Runtime

Defect 1811952: An error occurred when you created a user account on the Resource Information screen.

Runtime » Client

Defect 1753685: When you viewed a timesheet in List mode in Costpoint PWA, the timesheet displayed only 20 rows. The timesheet displayed 80 rows in Landscape mode.

Defect 1816997: When you saved revisions to a timesheet, the Revision Explanation window opened but then closed immediately, so you could not add an explanation. You had to click Save again.

Runtime » Server

Defect 1815985: Extensions failed when there was a database stored procedure registered as After RS Open event.

Defect 1818684: The Mobile carrier selection should have been optional when Twilio SMS integration was used to send SMS text messages from Costpoint.

Defect 1823723: The link to open a record in the completion or rejection final email notification for an approval workflow did not include the user ID of the email recipient.

Materials

Engineering Change Notices » Apply Engineering Change Notices

Defect 1759355: When you generated a new Engineering Bill of Materials (EBOM) using the Engineering Change Notices (ECN) module, and you set the component parts to **Change**, the ECN implemented but did not populate EBOM_EXISTS_FL in the PART table, which caused it to be inaccessible to the Manage Engineering Bills of Material or Release Engineering Bills of Material application. The process worked correctly when the **Action Code** was set to **Add**.

Engineering Change Notices » Manage Engineering Change Notices

Defect 1759963: When you closed out an engineering change notice (ECN) and then accessed the record again to add a new detail line, you encountered an error.

Inventory » Enter Inventory Transfers

Defect 1763783: In Web Integration Console (WIC), when the record you inserted had a reservation ID, the record overwrote the material handler ID set in WIC with the requester from Manage Inventory Reservations instead.

Inventory » Manage Cycle Count Schedules

Defect 1756925: When you tried to add a new row, you encountered the following error: "Can't add new row 0. This row already exists in result set."

Master Production Scheduling » Manage Master Production Schedules

Defect 1820198: When you queried a Manage Production Schedule MPS item, the dates of the newly added items were in a different format than those that were already loaded.

Master Production Scheduling » Update Master Production Schedules

Defect 1811905: When you created a purchase order (PO) with two lines that were both for the substitute part, Costpoint did not allocate line two to the original part's reservation, and a reschedule order was created.

Material Requirements Planning » Manage Detailed Part Schedule

Defect 1816939: When you ran Manage Detailed Part Schedule, the application displayed an incorrect warehouse for transfer reservation.

Material Requirements Planning » Update Material Requirements Plan

Defect 1678285: When you created a purchase order (PO) with two lines that were both for a substitute part, the system allocated the first line to the original part's reservation and created a reschedule order.

Defect 1819059: (Oracle) When you ran Update Material Requirements Plan, the process failed at phase 4 of 5 at 46% and provided an end date time but did not complete the process. The View action report displayed as "Failed."

Procurement Planning » Apply PO Info to Purchase Requisitions

Defect 1751943: You encountered an application login issue.

Procurement Planning » Manage Simple Purchase Requisitions

Defect 1812699: In Web Integration Console (WIC), you were unable to load a simple purchase requisition with multiple lines.

Production Control » Manage Manufacturing Orders

Defect 1815888: When a part had subparts set up for the part and subparts set up for a project, only the subparts for the project displayed on the Substitute Parts subtask for manufacturing orders (MO), and the project did not match the project of the MO.

Defect 1816093: When you opened the previously saved record, the **Date Edit** field did not display the General Settings Date Edit value.

Defect 1823716: When you used the lead time offset, the manufacturing order (MO) **Need Date** was incorrectly set.

Purchasing » Manage Purchase Orders

Defect 1762097: The application has been modified to improve its performance for use in the Web Integration Console (WIC),

Defect 1811227: In Web Integration Console, the manufacturer part and vendor part were not loaded into the purchase order (PO) even though the data were in the XML.

Defect 1818917: In Web Integration Console, when you updated a PO to add an acknowledgment date to the header and lines, you encountered the following error: "The total of all Account distribution amounts must equal the PO line total amount."

Receiving » Manage Purchase Order Receipts

Defect 1812644: You were unable to change the line receipt location in the record.

Receiving » Manage Quality Control Inspections

Defect 1751146: In Web Integration Console, when you sent an update to a quality control inspection, the update process incorrectly calculated the receipt quantity on the Serial/Lot subtask.

Defect 1765708: When you tried to inspect a serial tracked part, you encountered this error message: "Serial number is already in stock."

Receiving » Manage Vendor Returns

Defect 1763341: When you reversed a vendor return, the application displayed incorrect serial/lot information.

Sales Order Entry » Import Sales Orders

Defect 1813683: When you reimported a sales order (SO) using a new catalog ID, the Remit Address Code was not included in the record.

Defect 1813686: When you reimported a sales order (SO) using a new catalog ID, Costpoint did not update the SO new approval process tied to the catalog.

People

Employee » Manage Employee HSA Elections

Defect 1830147: The **Plan YTD Deductions** amount should include employee earnings that have a **Pay Cycle End Date** from the previous year in the following cases:

- The **FSA/HSA Deduction Method** of the pay period is set to **Calculate based on the check date** and the check date of employee earnings is within the HSA plan year.
- The **FSA/HSA Deduction Method** of the pay period is set to **Calculate based on the pay period end date** and the record's **Pay Period End Date** is within the HSA plan year.

Employee » Manage Employee Information

Defect 1762016: When you entered a badge ID without a group ID on the Manage Employee Information screen, the following error message did not display: "A Badge Group is required when a Badge ID is selected. Please enter the Badge Group to which this Badge ID is assigned." The Manage Employee Information screen should display the error message similar to when you perform the same action on the Manage Employee Project Manufacturing Status screen.

Defect 1813412: The screen did not display the following error message when you selected the **Manufacturing Execution** checkbox and then left the **Login ID** field blank: "Please enter a Login ID. Manufacturing Execution requires one for every Employee."

Employee Self Service » Life Events/New Hires

Defect 1749826: When you created a life event for a change to Employee Direct Deposit alone, you could not confirm the life event. The following error displayed: "You must either save or indicate no change in each module before you can confirm."

The error did not display if you selected the life event's **Requires Approval** checkbox on the Configure Life Events screen. The life event, whether confirmed or unconfirmed, remained on the Manage Life Event User Flow Status screen until an administrator deleted it.

Defect 1757240: The following error message referenced an incorrect location for selecting beneficiaries: "You cannot confirm your elections until you have selected a beneficiary. Please navigate to the Beneficiaries tab and make your selection."

Employee Self Service » W-2s

Defect 1814928: The column label in the report should be "b - Employer's identification number (EIN)." The label was missing "(EIN)."

Defect 1825218: The W-2s screen was not available if the IP address of Costpoint was blocked (set to **Blocklist**) on the Access List tab of the Product Configuration Utility.

Labor » Create Retroactive Timesheet Adjustments

Defect 1753784: A system error occurred when you ran the process if the **Override Auto-Adjust %** field did not have a value.

Defect 1820259: The application used the new (retroactive) timesheet date to extract currency exchange rate when calculating retroactive adjustment. Instead, the application should use the original timesheet date for the process. This issue affects you if you use Costpoint Multicurrency functionality.

Labor » Import Timesheets

Defect 1769195: After you upgraded from 7.1.25, you experienced long processing times for the Import Timesheets report. This occurred only for the report generation and not the actual processing. For example, a report took only 8 minutes to complete, but after the upgrade, the report took 1-2 hours to finish. This issue also occurred when you ran the report in batch mode.

Labor » Print Labor Utilization Report

Defect 1744877: If you did not enter a value in the **Subperiod - End** field, the generated report excluded employees hired in the middle of the month.

Payroll » Print W-2s

Defect 1817609: If the values of **Box 18** and **Box 19** on the Manage W-2s screen were **0.00**, the values of the corresponding fields in the Print W-2 report were blank.

Payroll » Update State Filing Statuses

Defect 1816974: The Update State Filing Statuses screen must be added back to the Costpoint menu. This update reverses the menu change in MR 8.1.12.

Planning

Administration » Configuration Settings

Defect 1813274: The account lookup of the Staff Hours link did not display the correct data for newly created accounts.

Administration » Report Table Update Process

Defect 1765546: A Refresh Process tab has been added to the Configuration Settings screen to enable rebuilding of data in the ECOMPOSITE_BURD_RATE table.

Budgeting

Defect 1766494: EMPL_RATES class has been tuned to increase performance.

Defect 1766501: PROJ_BUD_EMPL class has been tuned to increase performance.

Defect 1766504: CALC_COMP_BURD_RATE class has been tuned to increase performance.

Defect 1824432: You encountered performance issues when you ran Top Level Reports.

Cost Analysis

Defect 1765648: INNER JOIN to COMP_BURD_RATE was causing data omissions.

New Business Budgeting » New Business Budgets

Defect 1818630: Non-owners with Org Rights are now allowed access and editing rights in the application when the Shared flag is selected.

Organization Budgeting » Labor Hours Analysis

Defect 1821437: The Labor Analysis Reports did not display Org Budget information for a future FY.

Organization Budgeting » Profit and Loss by Account

Defect 1817390: You encountered FY errors when you ran the application.

Organization Budgeting » Profit and Loss Chart by Period

Defect 1699026: The Fiscal Year periods were out of order.

Planning

Defect 1768828: The Manage Users and Manage User Groups applications have now been removed from the Planning menu.

Project Budgeting » Import Budget/EACs from Excel

Defect 1766598: You encountered errors the first time you uploaded project budgets using Import Budget/EACs from Excel.

Project Budgeting » Project Budgets / EACs

Defect 1813266: PLC validations were applied even to employees who were not associated with a project.

Defect 1829657: The Actuals of a terminated employee were not displayed in the Staff Hours link of a newly created EAC.

Project Budgeting » Project Status

Defect 1812614: The **Ending** date lookup did not include the transaction dates of projects without budgets.

Defect 1814273: There was an error generating a Project Status Report when the end date was beyond POP.

Projects

Billing » Manage Standard Bills

Defect 1759953: The application took a long time to return all records when you queried level 1 projects.

Billing » Print Unbilled Analysis Report

Defect 1690311: The application took more than 25 minutes to generate the report.

Defect 1824439: You encountered the following error when you ran the report: "java.sql.SQLException: [FMWGEN][SQLServer JDBC Driver][SQLServer]Cannot continue the execution because the session is in the kill state."

Cost and Revenue Processing » Compute Revenue

Defect 1764457: The application took longer than expected to finish processing when you computed revenue for projects that have the **Calculate Revenue on Units** checkbox selected on the Manage Revenue Information screen.

Cost and Revenue Processing » Post Revenue

Defect 1763984: After you upgraded to Costpoint MR 8.1.7, this application ran slower than expected and took longer to complete processing.

Project Setup » Manage Project User Flow

Defects 1736880, 1812934, and 1812935: Changes have been made to the following applications to set the default value of the **Date Edit** field on the UDT02S screen when creating a new project record or importing project records into Costpoint:

- Manage Project User Flow (PJMBASIC) and Import Project Master Data (PJPPREP)
  - If Time & Expense is co-deployed with Costpoint, the **Date Edit** field on the UDT02S screen defaults from the value of the **Date Edit** field on the General Settings screen.
  - If Time & Expense is not co-deployed with Costpoint, **Date Edit** in UDT02S is set to null.
- Mass Add Project Master Data (PJPMADD)
  - Whether or not Time & Expense is co-deployed with Costpoint, the value of **Date Edit** in UDT02S for the destination project will come from the source project.

Defect 1761641: Costpoint set TOP_LVL_WRK_FRC_FL to N when you entered a new low-level project using Web Interface Console (WIC), even if the top-level project has the **Use Top Level Work Force** checkbox selected. On the Manage Project User Flow screen, the checkbox for the newly created project was shown as selected, but the backend still displayed N.

As a workaround, edit anything on the new project to enable the **Save** icon, and then save the record. This will update the backend with the correct value.

Defect 1815012: When you copied project levels from one project to another, Costpoint pasted the data to the source project instead of the destination project, resulting in duplicate lines on the Proj Levels subtask for the source project.

Project Setup » Manage Vendor Employee Work Force

Defect 1765461: If the PLC description has lowercase and uppercase characters and you assigned the PLC to an employee on the Assign PLC to Vendor Employee Work Force subtask, Costpoint converted the PLC description to all uppercase characters on the PLCs Assigned to Vendor Employee Work Force table window.

Project Setup » Update Project Contract and Funded Values

Defect 1744692: Costpoint doubled the award fee value when you ran both the Synchronize Project Performance Tables and Update Project Contract and Funded Values applications.

Subcontractor Management » Print Subcontractor Invoices

Defect 1739493: The application was taking too long to complete processing. In some instances, a 504 error (server timeout) also occurred.

Reports & Analytics

Business Intelligence » Business Intelligence

Defect 1811758: An error occurred when the Labor Variance by PLC report was generated.

Defect 1815880: The following error occurred when the Work Assignment Charge Detail Report was generated: "XQE-DAT-0005 Cannot convert the double value '99999.0' to data type smallint." This error affects you if you use an Oracle database.

Defect 1815881: The following error occurred when the Subcontractor Status Report was generated: "XQE-DAT-0005 Cannot convert the double value '99999.0' to data type smallint." This error affects you if you use an Oracle database.

Defect 1816488: An error occurred when one of the following prompts or a combination of them was used in generating the PO Payment and Remaining Balance Report:

- Accounts
- Organizations
- Projects

Defect 1818830: The Expenses view was missing in the Expense package filter.

Dashboards » Home Dashboard

Defect 1342009: The **New Timesheet**, **New Report**, and **New Authorization** links have been removed from the My Timesheets, My Expense Reports, and My Expense Authorizations dashparts, respectively. This is to avoid duplication of functionality with the **Launch** link.

You can still open the Timesheet, Expense Report, or Expense Authorization screen with a blank record from these dashparts using the **Launch** link, provided you have not selected any record or checkbox on the dashpart. If you selected any record, **Launch** becomes **Launch Selected** and the drill-through screen will open with data for the records you selected (as with current functionality).

Time & Expense

Expense » Expense Authorization

Defect 1812554: When **Override Dates** was not selected, project POP (Period of Performance) dates were not validated when Time & Expense was co-deployed with Costpoint. This issue also affected other applications.

Affected Applications	Defect No.
Manage/Approve Expense Authorizations	1812555
Manage/Approve Expense Reports	1812553
Print Expense Report	1812552
Manage/Approve Timesheets	1812551
Timesheet	1811923

Expense » Expense Report

Defect 1766765: When you deleted a meal or lodging expense, temporary records were not cleared and were set to 0. This resulted in a system error when you added back the expense.

Defect 1782430: After you selected a UDT02 charge type in Charge Allocations, the ID was cleared from the UDT02 field, but you were still able to save the record.

Defect 1825412: When you had only Proxy rights for task approval, you were able to approve tasks that were not assigned to you if you used the Gears icon.

Expense » Maintain Expenses

Defect 1728353: When you copied the merchant info from Excel and pasted it into the **Merchant** field, the field was cleared after you saved the record.

Expense » Manage/Approve Expense Reports

Defect 1764469: When you entered a lodging expense in Wizard mode, you received errors after saving incomplete data. When you switched to Expert mode, you received errors for missing UDTs.

Defect 1825413: When you had only Proxy rights for task approval, you were able to approve tasks that were not assigned to you if you used the Gears icon.

Time & Expense

Defect 1766851: The Project Long Name charge description was missing in the Favorites tree.

Time » Change Timesheet Status

Defect 1816909: When you select **Mark Timesheets Signed**, the timesheet sign validation will now be bypassed if **Overtime Handling** is selected as **None** for that class.

Time » Daily Floor Check

Defect 1812011: When you copied data from Daily Floor Check to Excel, the results were duplicated.

Time » Timesheet

Defect 1744818: When you printed a timesheet, it did not include the total regular hours and total overtime hours.

Defect 1757073: When you opened a timesheet with an invalid UDT07, you received trap validation errors instead of a critical system error.

Defect 1763114: Users were able to delete previously saved charge lines and save the changes without receiving an error message.

Defect 1766452: When a Pre-Sign stored procedure was configured to display an error message, it did not display the message a second time even though both timesheet periods included the same error. This occurred only when the Pre-Save procedure was configured to display warnings.

Defect 1766723: When you corrected a timesheet that was enabled for line-level approval, and you modified only the PLC, the existing hours were cleared from the timesheet cell, but the line was not reset to Pending.

Defect 1831284: In sytems co-deployed with Costpoint, the Top Level/Project Level UDT02 description did not display.

Time » Timesheet Status

Defect 1812010: When you copied data from Timesheet Status to Excel, the results were duplicated.

Time » Work Schedule/Leave

Defect 1813252: Default verbiage in the text box was updated.

Known Issues

The following are known issues in this release.

Unable to Display Barcode in HTML Format

If you run the MO Pick List report via a Chrome or MS Edge web browser, you could not see the barcode in the report. As a workaround, use Mozilla Firefox as web browser or print the MO Pick List report as a PDF.

This issue has been reported to Google.

Failed Execution of Scheduled Reports

If you have a report that is scheduled to run frequently during the day, succeeding runs may stop unexpectedly. As a workaround, you can do a manual run of the report and then reschedule the next execution.

This issue has been reported to IBM.

Unable to Set BI Reports as Homepage

You cannot set a Costpoint BI report as homepage when its **Run with full interactivity** field is set to **Yes**. As a workaround, set **Run with full interactivity** to **No**.

This issue has been reported to IBM.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support website 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 website.

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