Deltek Costpoint® 8.1.17

Release Notes

February 28, 2023

Contents

Deltek

Overview

Welcome to Deltek Costpoint 8.1.17 Release Notes. These release notes contain a summary of the following:

- Enhancements
- Software Issues Resolved
- Known Issues

These release notes address all of the modules associated with Deltek Costpoint 8.1.17, some of which your firm may not use. Skip the sections that do not apply to your implementation of Deltek Costpoint.

New Release Notes Format

Costpoint Release Notes are now delivered in HTML format and can be viewed at this link: https://help.deltek.com/product/Costpoint/8.1/ReleaseNotes. This web page contains links to the Release Notes for each release version as well as links to the Costpoint online help, Costpoint Information Center (CIC), and Costpoint Cloud Information Center (CCIC).

We will continue to provide PDFs for the next few releases as we transition to the new format.

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

Costpoint Business Intelligence 8.1.17 and Cognos Analytics 11.1.7

Costpoint BI 8.1.17 is the last Costpoint BI MR that is compatible with Cognos Analytics 11.1.7. Costpoint BI 8.1.18 and future Costpoint BI 8.1 MRs will only be compatible with Cognos Analytics with Watson 11.2.4. Note that you can continue to apply the Costpoint MRs beyond 8.1.17 regardless of which Cognos version you are deploying. Costpoint and Costpoint BI MRs are independent of each other.

Enhancements

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

Regulatory

Federal

2023 Federal Poverty Level

The 2023 poverty guideline for the 48 contiguous states and the District of Columbia is **$14,580**.

> **Note:** This update requires patch dbc_810_11051.

2023 Form 941 Updates

A draft of Form 941 for use in the first quarter of 2023 was issued by the Internal Revenue Service.

The Form 941, Employer's Quarterly Federal Tax Return verbiage was updated as follows:

Section	Current	New
The text at the rightmost column of Lines 5a, 5a(i), 5a(ii)	*Include taxable qualified sick and family leave wages paid in 2022 for leave taken after March 31, 2021, and before October 1, 2021, on line 5a. Use lines 5a(i) and 5a(ii) only for taxable qualified sick and family leave wages paid in 2022 for leave taken after March 31, 2020, and before April 1, 2021.	*Include taxable qualified sick and family leave wages paid in this quarter for leave taken after March 31, 2021, and before October 1, 2021, on line 5a. Use lines 5a(i) and 5a(ii) only for taxable qualified sick and family leave wages paid in this quarter for leave taken after March 31, 2020, and before April 1, 2021.
Worksheet 1	Worksheet 1: Credit for Sick and Family Leave Wages for Leave Taken After March 31, 2020, and Before April 1, 2021	Worksheet 1. Credit for Qualified Sick and Family Leave Wages Paid This Quarter for Leave Taken After March 31, 2020, and Before April 1, 2021
Worksheet 2	Worksheet 2: Credit for Qualified Sick and Family Leave Wages Paid in 2022 for Leave Taken After March 31, 2021, and Before October 1, 2021	Worksheet 2: Credit for Qualified Sick and Family Leave Wages Paid This Quarter for Leave Taken After March 31, 2021, and Before October 1, 2021

The labels in the Print Quarterly Federal Payroll Tax Report were updated to reflect the changes to the Form 941.

> **Attention:**
>
> For more information, refer to:
>
> - **Form**: http://www.irs.gov/pub/irs-pdf/f941.pdf
> - **Instruction**: http://www.irs.gov/pub/irs-pdf/i941.pdf

Affordable Care Act Updates

This Costpoint release provides the following ACA - 1095-C updates:

- Code 1A will only be assigned to employees on Line 14 of form 1095-C if the **Qualifying Offer Method** checkbox is selected on the Create 1094-C and 1095-C Data screen.

- An employee's employment history is used to determine the Line 14 and Line 16 codes on form 1095-C. Because some clients track employment using the Affirmative Action **Effective Date is Hire Date** and **Effective Date is Term Date** checkboxes on the Manage Employee Salary Information screen, we added the ability to use those checkboxes when determining an employee's employment history.

- An employee will now be eligible to receive a form 1095-C if they were offered and elected coverage in the year prior to their hire date. If an employee's hire date is in the following year but elected self-insured coverage for one or more months of the calendar year being analyzed, code 1G would be entered on Line 14.

- An employee will now be eligible to receive a form 1095-C if they were offered and elected coverage in the year following their termination date. If an employee was terminated in the prior year but elected self-insured coverage for one or more months of the calendar year, code 1G would be entered on Line 14.

- The priority order for the Form 1095-C Line 14 codes will be updated.

  - Code 1E will take priority over code 1K

    1E. Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) and spouse. Do not use code 1E if the coverage for the spouse was offered conditionally. Instead, use code 1K.

    1K. Minimum essential coverage providing minimum value offered to employee; at least minimum essential coverage offered to dependents; and at least minimum essential coverage conditionally offered to spouse. (See Conditional offer of spousal coverage, earlier, for an additional description of conditional offers.)

  - Code 1C and 1D will take priority over code 1K

    1C. Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) (not spouse).

    1D. Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to spouse (not dependent(s)). Do not use code 1D if the coverage for the spouse was offered conditionally. Instead, use code 1J.

- The priority order for the Form 1095-C Line 16 codes will be updated. 2D must be done before 2B and after all other codes. According to the IRS instructions, if an employee is in an initial measurement period, enter code 2D (employee in a section 4980H(b) Limited Non-Assessment Period) for the month, and not 2B (employee not a full-time employee).

This release also applies minor alignment adjustments that are necessary to accommodate the 2022 ACA Form 1094-C and 1095-C.

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

The Create 1094-C and 1095-C Data screen provides the following new options:

Field	Description
Employment History Source	Select one of the two methods of tracking an employee's employment history with the company.
	▪ **Manage Employee Information**: This option will use the Employment History subtask on the Manage Employee Information screen to determine whether an employee was employed for a given month. If you use this method of tracking employment history, select this option.
	▪ **Manage Employee Salary Information**: Though it is not a common setup, some employers use the Affirmative Action **Effective Date is Hire Date** and **Effective Date is Term Date** settings on the HR Information tab of the Manage Employee Salary Information screen to track employment history. If you use this method of tracking employment history, select this option.

State

2023 SUTA Wage Base

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.

Delaware

The unemployment-taxable wage base decreases from $14,500 to **$10,500**.

Illinois

The unemployment-taxable wage base increases from $12,960 to **$13,271**.

North Carolina

The unemployment-taxable wage base increases from $28,000 to **$29,600**.

Virgin Islands

The unemployment-taxable wage base decreases from $30,800 to **$30,200**.

> **Note:** This update requires patches dbc_810_11051 and dbc_810_11041.

Guam 2023 Tax Table Update

The tax tables of Guam were updated based on 2023 federal tax tables.

To support the state requirements, Costpoint adds updated records to the following screens:

▪ Manage State Standard Deductions

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

> **Attention:** For more information, refer to https://www.irs.gov/forms-pubs/about-publication-15-t.

> **Note:** This update requires patch dbc_810_11051.

Illinois 2023 Tax Table Updates

Illinois released the 2023 withholding methods. The value of a state allowance increases from $2,425 to **$2,625**.

To support the state changes, Costpoint adds updated records to the following screens:

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

> **Attention:** For more information, refer to:
> https://tax.illinois.gov/content/dam/soi/en/web/tax/forms/withholding/documents/currentyear/il-700-t.pdf.

> **Note:** This update requires patch dbc_810_11045.

Maryland 2023 Tax Table Updates

Maryland released the 2023 withholding guide, which contains a withholding percentage method for one additional local tax rate compared to 2022.

- The minimum and maximum standard deduction increases to **$1,700** and **$2,550** annually, up from $1,600 and $2,400.
- A percentage method corresponding to a 2.75% local tax rate was added to the guide.
- Six Maryland counties made changes to their income tax rates for 2023, including two counties that introduced graduated rates.

To support the state changes, Costpoint adds updated records to the following screens:

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

> **Attention:** For more information, refer to:
> - **2023 Withholding Guide**:
>   https://www.marylandtaxes.gov/forms/23_forms/Withholding_Guide.pdf
> - **2023 Withholding Tax Facts**:
>   https://marylandtaxes.gov/forms/Tax_Publications/Tax_Facts/Withholding_Tax_Facts/Witholding_Tax_Facts_2023.pdf

> **Note:** This update requires patches dbc_810_11041.

Anne Arundel County

Anne Arundel County introduced graduated tax brackets. Anne Arundel County, which used a tax rate of 2.81% in 2022, now uses that rate for taxable income of more than $50,000 in 2023 and uses a 2.7% rate for taxable income of up to $50,000.

> **Note:** Maryland's 2023 withholding guide added a percentage method corresponding to a 2.75% local tax rate, which means that Anne Arundel County will use the combination of 2.75% and 2.85% tables.

Frederick County

Frederick County introduced graduated tax brackets. Frederick County used a tax rate of 2.96% in 2022. In 2023, a 2.75% rate applies when an employee earns up to $100,000 and has a filing status of married filing jointly, head of household, or qualifying widow/widower with dependent child, or when an employee earns up to $50,000 and has a filing status of single, married filing separately, or dependent. Otherwise, the rate of 2.96% applies.

> **Note:** Maryland's 2023 withholding guide added a percentage method corresponding to a 2.75% local tax rate, which means that Frederick County will use the combination of 2.75% and 3.00% tables.

Michigan 2023 Tax Table Updates

The value of a state allowance is to be $5,400, up from $5,000, and the state's flat tax rate is unchanged at 4.25%, according to the 2023 Michigan Income Tax Withholding Guide (Form 446) posted in their official website.

To support the state requirements, Costpoint adds updated records to the following screens:

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

> **Attention:** For more information, refer to the 2023 Michigan Income Tax Withholding Guide.

> **Note:** This update requires patch dbc_810_11051.

Mississippi 2023 Tax Table Updates

Mississippi released the 2023 withholding formula, which now uses a flat 5% income tax rate. In 2022, the formula used two brackets of 4% and 5%.

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

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

> **Attention:** For more information, refer to:
>
> - **Flowchart**:
>   https://www.dor.ms.gov/sites/default/files/Business/Computer%20Payroll%20Flowchart%20-%2011-02-22.pdf
> - **Employee's Withholding Exemption Certificate**:
>   https://www.dor.ms.gov/sites/default/files/Business/89350218.pdf

> **Note:** This update requires patch dbc_810_11041.

North Dakota 2023 Tax Table Updates

North Dakota's 2023 withholding methods were posted in their official website. The state provides two methods, one for pre-2020 Forms W-4 and one for Forms W-4 from 2020 or later, as it has each year since 2020.

- The value of an allowance for a pre-2020 Form W-4 was $4,300 annually, unchanged from 2022.
- The tax brackets in both formulas were adjusted, and the tax rates used continue to range from zero to 2.9%, with a supplemental tax rate of 1.84%.

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

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

> **Attention:** For more information, refer to:
> https://www.tax.nd.gov/sites/www/files/documents/forms/income-tax-withholding-rates-and-instructions-booklet-2023.pdf.

> **Note:** This update requires patch dbc_810_11041.

Oregon 2023 Tax Table Updates

The Oregon Department of Revenue (DOR) issued guidance on withholding tax formulas, effective January 1, 2023.

- The federal tax adjustment amount increased from $7,250 to **$7,800** for an employee with annual wages up to $50,000.

- The federal tax adjustment phase out amounts for an employee with annual wages $50,000 or greater has changed in 2023.

- The tax table has changed for an employee with annual wages of up to $50,000.

- The tax table has changed for an employee with annual wages of $50,000 or higher.

- The allowance amount increased from $219 to **$236**.

- The standard deduction amount increased from $2,420 to **$2,605** for an employee filing "Single" with fewer than 3 allowances.

- The standard deduction amount increased from $4,840 to **$5,210** for an employee filing "Single" with 3 or more allowances.

- The standard deduction amount increased from $4,840 to **$5,210** for an employee filing "Married".

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

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

> **Attention:** For more information, refer to: https://www.oregon.gov/dor/forms/FormsPubs/withholding-tax-formulas_206-436_2023.pdf.

> **Note:** This update requires patch dbc_810_11041.

Virgin Islands 2023 Tax Table Updates

The tax tables of the Virgin Islands were updated based on 2023 federal tax tables.

To support the state requirements, Costpoint adds updated records to the following screens:

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

> **Attention:** For more information, refer to https://www.irs.gov/forms-pubs/about-publication-15-t.

> **Note:** This update requires patch dbc_dbc_810_11051.

West Virginia Q1 2023 SUTA Electronic Filing

According to the WorkForce West Virginia Magnetic Media Wage Reporting Specifications Manual, employers must report the SOC Code (or Employee Job Title) and County Name in the Quarterly Unemployment Insurance Wage Report.

> **Attention:** For more information, refer to the Magnetic Media Wage Reporting Specifications Manual.

> **Note:** This enhancement requires patch dbc_810_11054.

Manage Employee Taxes (PRMETAX)

To support the state requirements, the Manage Employee Taxes screen provides the following updates:

> **Note:** These updates also apply to the Taxes subtask on the Manage Employee Information screen.

- The screen provides the following new field:

Field	Description
County (WV)	Enter the county to be reported in the SUTA file. For West Virginia, enter the county name in which the majority of the employee's job duties are performed.

- The label of the **Occupational/SOC Code** field was updated to indicate **WV** (West Virginia).
- The screen displays warning messages in the following cases:
  - If SUTA State is West Virginia and there is no SOC Code assigned to the employee
  - If SUTA State is West Virginia and there is no County assigned to the employee

Manage SUTA Tax File Data (PRMSMM)

The Manage SUTA Tax File Data screen features the following updates:

- The employee's job title shall be reported in record S, position 221-250.
- The SOC Code shall be reported in record S, position 251-256.
- The employee's county name shall be reported in record S, position 257-271.
- An error message will display if there is at least one employee where both SOC code and job title have not been assigned to the employee.
- The screen provides standard validations for fields from the Configure Company Information screen (when applicable).

View Employee Taxes (PRQETAX)

- The screen provides the following new field:

Field	Description
County (WV)	This field displays the county to be reported in the SUTA file. For West Virginia, this is the county name in which the majority of the employee's job duties are performed.

- The label of the **Occupational/SOC Code** field was updated to indicate **WV** (West Virginia).

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report now provides information for the new County column on the Employee Tax table.

Installation

MR Installer

The Costpoint 8.1.17 MR installer has been updated to include the latest quarterly patch release for 12.2.1.4.

- January 2023 SPB - p34974729_122140_Generic.zip

Also, the Java Development Kit (JDK) is upgraded to version 1.8.0_361 and is installed with the Costpoint 8.1.17 MR installer.

People

Separate Fields for Max Regular Hours and Estimated Hours on the Manage Leave Periods Screen

Prior to this release, the existing **Max Regular Hours** field on the Manage Leave Periods screen was used for two separate purposes:

- The Compute Leave Accruals application used the maximum regular hours when calculating leave accruals based on an **H-Hours Worked** compute method.

- The Manage Employee Leave screen used the field to determine the estimated leave.

The existing functionality of the field caused an issue when you entered a large number in the **Max Regular Hours** field. You usually enter a large **Max Regular Hours** value to set no limitations on the number of hours used to calculate accruals that are based on hours worked. The large number in the **Max Regular Hours** field causes a system error when you queried Employee Leave Balance (EMPL_LV_BAL) records.

To address this issue, the Manage Leave Periods screen now provides a **Maximum Regular Hours** for the calculation of leave accruals and a separate **Estimated Hours** field for the Manage Employee Leave and leave report applications.

Manage Leave Periods (LDMLVPD)

The Manage Leave Periods screen now allows you to use separate fields for entering the maximum number of regular hours and the estimated accrual hours.

Field	Description
Max Regular Hours	Enter the maximum number of hours that can be used to determine the maximum number of regular (non-overtime) hours that can be used in a leave period to compute a leave code that is based on an **H-Hours Worked** computation method. Costpoint determines the accrued leave amount by multiplying the leave accrual rate (on the Manage Leave Codes screen) by the timesheet regular hours or the value in this field, whichever is less.
	Enter 999,999,999,999.99 if there is no limit on the number of regular work hours that can be used to calculate the leave accrual when the **Compute Method** is **H-Hours Worked**.
Estimated Hours	Enter the number of hours that will be used to determine an employee's estimated accrual hours on the Manage Employee Leave and employee leave applications. This value will be used only for leave codes with a **Compute Method** of **H-Hours Worked** or **U-Unit of Hours Worked**.
	If the employee's leave accrual is based on **H-Hours Worked**, the estimated accrual will be calculated by multiplying the estimated hours by the leave code's accrual rate.
	If the employee's leave accrual is based on **U-Unit of Hours Worked**, the estimated accrual will be calculated as follows:
	▪ Initial Number of Units = Estimated Hours / Unit of Hours
	▪ Number of Units = Round the Initial Number of Units down to the nearest whole number
	▪ Estimated Accrual = Number of Units x Accrual Rate

Manage Employee Leave (LDMELV)

The estimated leave accrual calculation was updated for cases when the **Compute Method** is **U-Unit of Hours Worked**. Instead of simply dividing the estimated hours by the unit of hours, the application rounds the number of units down to the nearest whole number.

The application continues to use the leave cycle's estimated hours to determine the estimated leave accrual.

Compute Leave Accruals (LDPCLHF)

The application now uses the new MAX_REG_HRS column, instead of the STD_LV_PD_HRS column, on the LV_PD table when calculating leave based on a **Compute Method** of **H-Hours Worked**.

Print Employee Leave Report (LDRELV)

If the leave code's **Compute Method** is **H-Hours Worked** or **U-Unit of Hours Worked**, the application uses the STD_LV_PD_HRS column on the LV_PD table to determine the estimated hours.

This release also updates the layout of the screen.

Time & Expense

New Option to Display or Hide Leave Codes in the Timesheet Leave Request Form

An **Allow Request Leave** checkbox was added to the Leave subtask of the Timesheet Classes application. This setting is selected by default.

When this checkbox is selected, the leave code will display in the **Leave Type** drop-down list of the New Leave form in the timesheet.

Clear the checkbox if you do not want the leave code to display when the user enters planned leave or submits a leave request from the timesheet.

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

Software Issues Resolved

Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was developed to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

Accounting

Accounts Payable » Create PO Vouchers from POs/Receipts

Defect 1871160: When you created a PO voucher from a PO or receipt that has multiple account distribution lines, the total of the discount amounts of the account distribution lines did not match the discount amount of the voucher.

Accounts Payable » Import Vendors

Defect 1821389: You were able to import an existing vendor without encountering an error even if the **Overwrite the existing records** and **Allow Duplicate Name and Blank Location** checkboxes were cleared.

Defect 1836947: When you imported an existing vendor, the **Vendor Approval** status of that vendor was overwritten even if the **Overwrite the existing records** checkbox was cleared.

Accounts Payable » Print/Create 1099s and Magnetic Media

Defect 1867861: When you created a form 1099-NEC self-mailer, the recipient's state abbreviation was incorrectly printed as 'XX' on Copy 2 and Copy B.

General Ledger » Create Revaluation Entry

Defect 1697399: When you created a revaluation entry, Costpoint did not include previous manually entered revaluation entries in the calculation of the current balance sheet revaluation.

General Ledger » Create/Delete Intercompany Receivables

Defect 1760369: When you set the **Journals** option to **All**, intercompany receivables with only cash disbursement transactions were not processed. As a workaround, set the **Journals** option to **One**, and select **Cash Disbursements** in the **Start** field.

General Ledger » Manage Journal Entries

Defect 1849499: You encountered a critical system error when you set the **Lookup Type** to **Vendor Employee** on the Vendor Labor subtask and clicked the **Vendor** Lookup. As a workaround, manually enter the **Vendor** and select the correct one from the Lookup suggestions.

General Ledger » Print Sales/Value Added Tax Report

Defect 1863409: When you updated tax report tables, Costpoint updated records with blank commodity codes even if they were already included in final reports on the Print Sales/Value Added Tax Report and Print Intra European Community Trade Statistics Report screens. As a workaround, enter commodity codes for all items to prevent Costpoint from updating finalized records.

Admin

System Administration » Manage Content Types

Defect 1861816: When content files that were linked to more than one Costpoint record were migrated, the application did not bring over all linked files.

System Administration » Purge Report Table Data

Defect 1860112: When you ran Purge Report Table Data (SYPPURGR) to purge PSR Header and PSR Final Data, there were no error messages and the process showed as completed, but the logs showed the process completed with errors.

CRM & Contracts

Contracts » Manage Contracts

Defect 1861127: Content Management Integration (CMI) users were unable to view uploaded contract content through the File Upload process.

Resources » Manage Leads and Contacts

Defect 1811802: Voice was not dictating the business names on the Business Affiliations subtask when the user prompted Hey Deltek to read the business affiliations for a record.

This defect affects Costpoint Web and Mobile users.

Framework

Framework

Defect 1715542: When you selected a primary UDT for a timesheet line with Lookup in the Costpoint progressive web app (PWA), you received an error if multiple charges existed.

Defect 1825175: After you used Costpoint in Offline mode, a context row error occurred when you switched back to Online mode and opened the Manage Purchase Order Receipts (RCMPORC) screen to review updates, and then opened the Serial/Lot Info subtask and clicked **Save**. If you clicked **OK** on the error message, Costpoint was unresponsive.

Defect 1846841: You could not save a record in Online mode if changes were made in Offline mode.

Defect 1856946: A system error occurred while processing an approval using the link provided in the email notification.

Defect 1861153: Third-party software caused the Costpoint site to launch in the mobile device mode.

Defect 1865225: An intermittent critical system error occurred when approving fund requests and the system was using extensibility.

Defect 1866109: When you had a timesheet that included charges with UDT10 pay types in the class, auto-positioning was off, and lookup and manual entry were not allowed, you could see only the first charge branch when you drilled down to the branches.

As a workaround, do any of the following:

- Use autoposition mode.
- Drill down to the one branch that displays and use the Down Arrow on the keyboard to display another branch.
- Drill down to the one branch and click **Expand** to enlarge the dialog.

Runtime » Server

Defect 1867093: The Notify step in the Approval Workflow did not send the URL or workflow case in email notifications.

Installation

MR Installer

Defect 1877347: The PL/SQL statement delimiter needed to be changed from ";" to "/" in conformance with the Costpoint 8.1.16 DB Wizard statement delimiter requirements.

Materials

Bills of Material » Apply Mass Component Changes to Bills of Material

Defect 1863340: When you executed a mass component change, you encountered a system error.

Material Requirements Planning » Update Material Requirements Plan

Defect 1852283: When you performed a transfer reservation, Costpoint generated more orders than the required quantity.

Defect 1867739: When the **Plan Substitute Part** checkbox was selected on the Configure Materials Requirements Planning Settings screen and you ran Update Material Requirements Plan (MRP), the process failed but no error was displayed.

Procurement Planning » Create Purchase Orders

Defect 1856812: When you created a purchase order (PO), the DELTEK.PO_HDR had an inconsistent ROWVERSION when compared to the newly created PO.

Defect 1862909: When you generated a blanket purchase order (PO) from a requisition, the **Commit** field was set to the default for the part. However, when you generated a blanket PO through the Manage Purchase Orders screen, the default was excluded.

Procurement Planning » Manage Request for Quotes by Vendor

Defect 1862931: When you created a request for quote (RFQ) with at least one line where the quantity and quantity breakpoint contained a decimal and you tried to load a quote referencing the RFQ you created, Costpoint displayed an error message.

Product Definition » Manage Product Price Catalogs

Defect 1861908: Cospoint did not allow you to enter 0.1 or any decimal, but failed to validate 0. This allowed you to enter 0 to 99999999999999, which overlapped with the first two entries.

Production Control » Manage Manufacturing Orders

Defect 1849304: You encountered a system error when you opened the Substitute subtask of the manufacturing order (MO) requirements.

Defect 1854680: When you cloned a manufacturing order (MO) and saved the new MO, Costpoint either did not create the MO reservation or created it with zero (0) quantity.

Purchasing » Manage Purchase Orders

Defect 1856955: When you changed an existing purchase order (PO) line status to **Void**, you encountered a framework error. This happened when the XML contained an update to an exisitng PO line and a new one was inserted.

Defect 1857656: When you inserted a purchase order (PO) via the Web Integration Console (WIC), you encountered the following error: "The total of all Account Distribution amounts must equal the PO Line total amount."

Defect 1866936: When the **Print Prime Contract Number/DPAS Rating** checkbox was not selected and the **DPAS Rating Print Threshold (Func Curr)** field was blank on the Configure Purchase Order Print Options screen, the same **Print Prime Contract Number/DPAS Rating** checkbox on the Manage Purchase Orders screen was selected instead of being cleared and available.

Receiving » Manage Purchase Order Receipts

Defect 1860673: When you tried to save increases or decreases made to receipts of non-tracked parts in offline mode, Costpoint displayed an error message.

Sales Order Entry » Manage Invoices

Defect 1849316: When you updated an invoice in offline mode and then logged in and reviewed the updates, you encountered a system error.

Defect 1849318: You were unable to make any changes to a record with offline changes due to duplicate line error messages.

Sales Order Entry » Manage Sales Orders

Defect 1864757: There were errors in the developer log file of the application.

People

Employee » Manage Employee Information

Defect 1860096: The screen should allow you to track multiple veteran options. When you select a checkbox in the VETS 4212 group box, all other checkboxes and the date field in the group box should still be enabled. You should be able to select multiple checkboxes in the VETS 4212 group box. The VETS 4212 report should count only one person even if multiple checkboxes are selected.

Employee » Manage Job Templates

Defect 1862791: The report did not print the record on the Employees subtask but printed the records on the Skills and Degrees subtasks.

Employee Self Service » W-2s

Defect 1861852: When you printed the W-2 from Employee Self Service, the application did not print the entire amounts in Box 12. The amounts are truncated.

Labor » Import Timesheets from Deltek Time and Expense

Defect 1877431: The application was updated to allow wage determination for all currencies, instead of for the USD (U.S. Dollar) only. This update applies to Graham Maintenance Services LP only.

Leave » Manage Leave Periods

Defect 1853125: An error displayed when you changed the open period to the next period.

Payroll » Close Payroll Year

Defect 1865318: The screen displayed the incorrect pay period as **Next** in the **Pay Cycle Data** group box. As a result, if you ran the process, the application sets the incorrect pay period as the **Open** pay period.

Payroll » Create W-2 Table

Defect 1852687: A system error (PRIMARY KEY constraint) displayed when you ran the Create W-2 Table process. This issue occurred if a record with a Pennsylvania Worksite PSD Code and a record without a Pennsylvania Worksite PSD Code both existed for the same employee with different check dates within a year in the Employee Earnings Local Taxes table.

> **Note:** As an additional fix, an error message in the report file will not be displayed if the employee has no Pennsylvania Worksite PSD Code in the Employee Earnings Local Taxes table or Employee Local Taxes table when the Locality is set up for Box 14.

Payroll » Manage Federal Tax Tables

Defect 1882646: The 32% federal income tax bracket for Married, Step 2 Unchecked, was 379,099.99 instead of 378,999.99. This affects all Costpoint Payroll users, including those with employees in Guam and Virgin Islands.

As a workaround for this issue, you can manually enter/update the record on the Manage Federal Taxes screen. The record for Married, Step 2 Unchecked, effective 01/01/2023, should be:

Effective Date: 01/01/2023

Filing Status: Married (S_FED_FIL_STAT_CD = M)

Step 2 of W-4: Unchecked

For Taxable Income Over	Base Tax	Percent of Excess
0.00	0.00	0.00%
14,799.99	0.00	10.00%
36,799.99	2,200.00	12.00%
104,249.99	10,294.00	22.00%
205,549.99	32,580.00	24.00%
~~379,099.99~~ 378,999.99	74,208.00	32.00%
477,299.99	105,664.00	35.00%
708,549.99	186,601.50	37.00%

For companies with Guam and Virgin Islands employees, you can manually update the tax tables for these states on the Manage State Tax Tables screen to mirror the federal tax tables.

Payroll » Manage State Tax Tables

Defect 1882665: The tax tables for the following counties had the corresponding issues:

- **Frederick County**: The second row was missing in each tax table. If a married employee has an annual taxable income of over 100,000, then the tax is calculated as the amount over 100,000 times 7.75 percent. The initial 100,000 is not taxed at all because the base tax amount is missing.

- **Anne Arundel County**: The second row was missing in each tax table. To address this, the tables have been revised (recalculated) so that the lower income tax rate of 2.70% (using 2.75% tables) will be used on the first $50,000 of taxable income for every taxpayer. The base tax has been recalculated starting from the second row.

As a workaround for these issues, you can manually enter/update the records for Anne Arundel County and Frederick County on the Manage State Tax Tables screen:

Anne Arundel County

State: MD

Effective Date: 01/01/2023

Filing Status: Anne Arundel - Married/Head of Household (ANNE ARUNDEL-MARRIED)

For Taxable Income Over	Base Tax	Percent of Excess
0.00	0.00	7.5000%
50,000.00	3,750.00	7.6000%
150,000.00	11,350.00	7.8500%
175,000.00	13,312.50	8.1000%
225,000.00	17,362.50	8.3500%
300,000.00	23,625.00	8.6000%

State: MD

Effective Date: 01/01/2023

Filing Status: Anne Arundel - Single or Married w/h at Single rate (ANNE ARUNDEL-SINGLE)

For Taxable Income Over	Base Tax	Percent of Excess
0.00	0.00	7.5000%
50,000.00	3,750.00	7.6000%
100,000.00	7,550.00	7.8500%
125,000.00	9,512.50	8.1000%
150,000.00	11,537.50	8.3500%
250,000.00	19,887.50	8.6000%

Frederick County

    State: MD

    Effective Date: 01/01/2023

    Filing Status: Frederick - Married/Head of Household (FREDERICK-MARRIED)

For Taxable Income Over	Base Tax	Percent of Excess
0.00	0.00	7.5000%
100,000.00	~~0.00~~ 7,750.00	7.7500%
150,000.00	11,625.00	8.0000%
175,000.00	13,625.00	8.2500%
225,000.00	17,750.00	8.5000%

For Taxable Income Over	Base Tax	Percent of Excess
300,000.00	24,125.00	8.7500%

State: MD

Effective Date: 01/01/2023

Filing Status: Frederick - Single or Married w/h at Single rate (FREDERICK-SINGLE)

For Taxable Income Over	Base Tax	Percent of Excess
0.00	0.00	7.5000%
50,000.00	~~0.00~~ 3,875.00	7.7500%
100,000.00	7,750.00	8.0000%
125,000.00	9,750.00	8.2500%
150,000.00	11,812.50	8.5000%

Payroll » Update Employee Package Deductions

Defect 1871048: If the benefit plan's **Coverage Calculation Method** was **Coverage Table**, and the **Coverage Table** was **Age**, the application calculated contributions using the **Coverage Limit** on the Manage Benefit Plans screen. Instead, the application should use the limit on the Manage Coverage Amounts by Age screen.

Planning

Administration » Report Table Update Process

Defect 1813583: The backloaded labor history table was not in sync with the General Ledger. This caused the project to erroneously indicate that it needs updating.

Administration » User Maintenance

Defect 1866807: The **Administrator** column has been renamed **NB Admin**.

New Business Budgeting » Import New Business Budgets from Excel

Defect 1860913: Error messages have been revised to accurately describe problems.

New Business Budgeting » New Business Budgets

Defect 1854635: When you tried to add a General Labor Category (GLC) type to the Hours tab, you received the error message "Selected PLC is invalid in this project."

Defect 1859258: Changes have been made in the application so that the forecasted values for a terminated employee are retained when you modify a new business budget.

Defect 1866739: The changes made per Defect 1818630 have been reversed. When the Shared flag is selected, a non-owner can view but cannot modify New Business Budget details anymore. When the Shared flag is not selected, a non-owner can neither view nor edit the budget.

Organization Budgeting » Organization Budgets / Outlooks

Defect 1848125: Changes have been made in the application so that the forecasted values for a terminated employee are retained when you modify an Org Bud/OLK.

Organization Budgeting » Profit and Loss by Project

Defect 1867673: The project P&L report details did not display when the **Budget Group** setting was **BUDGET** but displayed when the setting was **BUD**.

Planning

Defect 1858950: You encountered an error during the refresh process when UDT01_ID had more than 15 characters.

Project Budgeting » Direct Project Cost Categories

Defect 1859848: Top-level reports did not display active projects when the **Report Type** was **Cost** and the **Include Inactive Projects** option was not selected.

Project Budgeting » Import Budget/EACs from Excel

Defect 1853082: Error messages have been revised to accurately describe problems.

Defect 1864678: When you modified a committed EAC by Excel upload, labor and nonlabor actuals were not retained.

Project Budgeting » Project Budgets / EACs

Defect 1835699: End dates were duplicated when you created a budget/EAC for a project with missing prior fiscal years.

Defect 1847268: When you calculated revenue using formulas with fee, you obtained incorrect fee rates.

Defect 1848119: Changes have been made in the application so that the forecasted values for a terminated employee are retained when you modify a project budget/EAC.

Defect 1848158: You encountered an issue when you created an EAC with duplicate vendor records in Subcontractor Hours and Consultant Hours. Due to this, the EAC became unmodifiable.

Defect 1851074: A warning message displayed when you saved a budget that included an inactive employee without forecasted hours.

Defect 1867816: You obtained an incorrect raw cost for a salaried employee with less than 2,080 work hours in a year when the **Hourly Rates to Use** was set to **None**.

Defect 1870179: Revenue adjustments were not taken into account during Over Ceiling - Funding calculation. This resulted in an incorrect value that displayed on the Revenue Analysis screen.

Defect 1871033: When an indirect Period of Performance (PoP) was shortened, newly created budgets/EACs did not pick up the revised start date and the forecast data either went missing or was moved.

Resource Planning » Budget By Resource

Defect 1835697: After two users modified the same budget within a few minutes of each other, a critical error occurred that prevented processing of either modification.

Defect 1863502: You encountered an error when you tried to commit a recently deleted assignment.

Projects

Billing » Calculate Standard Bills

Defect 1740295: When you calculated a bill, sales tax records were pulled into the BILLING_EDIT_DETL table with a transaction type C (cost) instead of type T (sales tax). When you posted the bill, the BILLING_SUM table was updated with the correct transaction type, but the BILLING_DETL_HIST table was updated with a C for S_TRN_TYPE.

Defect 1842448: For records using the RSBFNLBF (Loaded Labor Rate w/Burden w/Fee plus Non-labor w/Burden w/Fee) formula, fee on burden, discount, retainage, and withholding amounts were not correctly calculated when the **Use Transactional Currency Billing** checkbox was selected on the Manage Project Billing Information screen.

Defect 1851094: MU_RTNGE_AMT in the billing tables was incorrect in multiple periods where RPT_ONLY_FL was N, different exchange rates were used per period, and the **Use Transactional Currency Billing** checkbox was selected on the Manage Project Billing Information screen. This issue occurred for the following formulas:

- CPFH (Cost Incurred Plus Fee On Hours)
- LLRFNLBF (LLR W/Fee Plus Non-Labor W/Burden W/Fee)

Defect 1851095: The following issues occurred for records using the LLRCINLB (Loaded Labor Plus Non-labor Plus Burden On Non-labor) formula, depending on the selection of the **Use Transactional Currency Billing** checkbox on the Manage Project Billing Information screen:

- When that checkbox was selected, the functional retainage amount was incorrect for succeeding periods after Period 1.
- When that checkbox was not selected, the multicurrency discount, retainage, and withholding amounts were incorrect for succeeding periods after Period 1.

Defect 1851096: The computed multicurrency retainage and withholding tax amounts were incorrect when the **Use Transactional Currency Billing** checkbox was selected on the Manage Project Billing Information screen.

Defect 1851097: For records using the LLR (Loaded Labor Rate) formula, the computed retainage amount in billing currency was incorrect regardless of the **Use Transactional Currency Billing** checkbox selection on the Manage Project Billing Information screen.

Billing » Manage Closed Billing Detail

Defect 1869723: The following error displayed when you queried a project with sales tax amount: "Attempt to set an invalid value to combobox. object:S_TRN_TYPE value: T."

As a workaround, you can continue clicking **OK** until the error disappears.

Billing » Manage Project Billing Information

Defect 1813544: A fatal system error occurred in Print Standard Bills when detail-level records were deleted from the Manage Project Billing Information screen after calculating bills.

Manage Project Billing Information has been updated to resolve this issue:

- If dependent data exists in Manage Standard Bills, you will not be allowed to delete detail-level records. Manage Project Billing Information will display the following message: "This record cannot be deleted because dependent data exists."

- If no dependent data exists in Manage Standard Bills and you have a posted bill against the project, Manage Project Billing Information will display the following message, but you will still be able to delete the record: "Deleting this record may cause issues when printing previously posted invoices."

Billing » Print Standard Bills

Defect 1768859: A fatal system error occurred on this screen when detail-level records were deleted from the Manage Project Billing Information screen after calculating bills.

Billing » Reverse Previous Bills

Defect 1858784: Reversing invoices with sales tax resulted in an out-of-balance posting.

Cost and Revenue Processing » Post Revenue

Defect 1857731: Performance tuning has been conducted for this application to improve execution time, particularly for systems running on Oracle databases.

Defect 1859688: An incorrect error message displayed on posting when accounts and organizations were not linked, there was an incorrect account/organization combination, or the account/organization combination was blank.

This defect occurred when there were inactive account/organization combinations in the records selected for posting. As a workaround, activate all revenue account/organization combinations for the project(s) to post.

Cost and Revenue Processing » Rebuild Labor History

Defect 1750537: Costpoint deleted the IWO labor record from the LAB_HS table when the project has labor distribution and IWO labor with unbalanced data.

As a workaround, you can manually add the deleted IWO labor record on the Manage Project Labor History screen.

Cost and Revenue Processing » Redistribute Revenue

Defect 1866101: You encountered a SQL error of "No Rows Affected" when you ran this application for ITD Fee on Cost (ITDCPFC) projects.

Inter-Company Work Orders » Create IWO Allocations

Defect 1869703: Costpoint did not create an IWO allocation when there was a sales tax amount in the project(s) selected in Create IWO Allocations. The sales tax amount cannot be mapped since the transaction type has been changed to T in the BILLING_DETL_HIST table.

Project Setup » Manage Project User Flow

Defect 1716004: When you initially set a project as inactive, Costpoint inserted the inactive date into the Projects table. After you reset the project as active, however, the inactive date was not updated.

This defect affects Time & Expense projects in co-deployed Costpoint systems.

Defect 1760124: When you cleared the **Allow Edit** checkbox for the **Project Manager** field in a level 2 project and the projects below it, changed the **Project Manager** value in level 2, and then saved the record, Costpoint did not cascade the new **Project Manager** value to the lower project levels.

Defect 1820357: On the User-Defined Info subtask, the **Text Value** field displayed as blank when the number of characters entered exceeded 30. The backend table, however, can hold up to 50 characters for this field.

Defect 1852275: When you cloned multiple lines and tried to save the records, you received the following error message: "Cannot insert this record. The parent key was not found."

Subcontractor Management » Manage Open Subcontractor Detail

Defect 1850535: You were able to delete a subcontractor timesheet line on the Manage Open Subcontract Detail screen even if a subcontract invoice already exists in Manage Subcontractor Invoices for this timesheet record. When you tried to delete the timesheet record in Manage Subcontractor Invoices, you received an error message.

Validations have been added to Manage Open Subcontract Detail to prevent users from deleting a timesheet line that has already been invoiced.

Subcontractor Management » Manage Work Assignments

Defect 1762771: You were unable to edit labor rates for unposted invoices.

To address this issue, this application has been modified to implement the following logic when modifying vendor employee rates:

- Three- or two-way match items should allow individual vendor employee rates to be changed if the specific vendor employee has not been included in an invoice (either posted or unposted).

- Three- or two-way match items should not allow vendor employee rates to be changed if the vendor employee has been included in an invoice for that line item (either posted or unposted).

- All new vendor employees added to a PO line item should allow rate changes, as they have not yet been included in an invoice (either posted or unposted).

- If a vendor employee was included in an invoice but the invoice was deleted, and that was the only invoice the vendor employee was included, the rate can still be modified.

Reports & Analytics

Business Intelligence » Business Intelligence

Defect 1816676: The data on the PO Payment and Remaining Balance Report did not match the data on the View Purchase Order Status screen in Costpoint Materials.

Defect 1850185: You could not retrieve values from the data set on the Org Mgr Planning Performance Analytics and Resource Mgmt dashboards.

Defect 1852202: You could not view the HR Mgmt Dashboard when you belonged to the following object security groups:

- **CER__HR**
- **CER__PEOPLE**
- **CER__EMPLOYEE_SECURE**

As a workaround, you should be assigned to the **CER__ALL** or the **CER__PROJ_SECURE** security group.

Defect 1853742: All drill-through on the PO Payment and Remaining Balance Report had broken links.

Defect 1856868: The prompt page of the Labor Utilization report displayed the code for **Part-Time Employees** as **R** instead of **P**.

Dashboards » Home Dashboard

Defect 1830967: You encountered an intermittent error in My Tasks of the Home Dashboard when clicking **Approve** for a timesheet record with a blank functional role.

Time & Expense

Expense » Expense Report

Defect 1861043: When a tax rate was configured to allow modification, the modified amount was recalculated after you saved the configuration.

Defect 1864738: When a single user existed for a role (Project Manager), the supervisor assigned to that role was not added to the Approval task for a receipt that had been marked as Missing before the expense was submitted.

Defect 1866169: Following export, non-reimbursable amounts were exported to Costpoint, leading to employee overpayments. This issue also affected other applications.

Affected Applications	Defect No.
Export ERs / Advances	1870159

Time » Manage/Approve Timesheets

Defect 1867800: When you added time using WIC, charge description was required even though UDT01 or UDT02 was present.

Time » Timesheet

Defect 1854619: Overtime was not calculated or distributed correctly when the Level 2 hour requirement was exceeded.

Defect 1867783: In certain instances, performing a charge lookup by description resulted in a SQL statement error.

Known Issues

The following are known issues in this release.

Unable to Display Barcode in HTML Format in Costpoint BI

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 in Costpoint BI

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

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